FC STANDS Provider User Guide

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1 Introduction

1.1 Overview

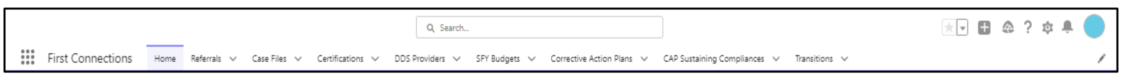
The ***AR DDS FC Stands Worker Portal*** facilitates the referral and management of Developmental Disability Services (DDS) and First Connections services. This provides a one-stop-shop for DDS workers as they manage the intake process, case review, and referral to DHS systems.

1.2 Global Features

The ***AR DDS FC Stands Worker Portal*** has many global features that give the user a seamless, intuitive experience.

1.2.1. Global Menu

The Global Menu is at the top of the ***AR DDS FC Stands Worker Portal*** within the top banner bar. This allows the user to navigate to Screens from anywhere within the portal. Below is a screenshot of the Global Menu:



1.2.2. Accessibility

The ***AR DDS FC Stands Worker Portal*** shall ensure quality services and comply with the Americans with Disabilities Act of 1990.

1.2.3. Social Security Numbers

For security purposes, all data stored within our databases, including Social Security Numbers, and Dates of Birth are encrypted with 128-bit encryption to ensure that in the event a data breach is attempted, the data will be protected.

2 About This Guide

2.1 Who Should Use This Document?

This guide is intended for the following groups:

- DHS Users

2.2 Prerequisite Knowledge

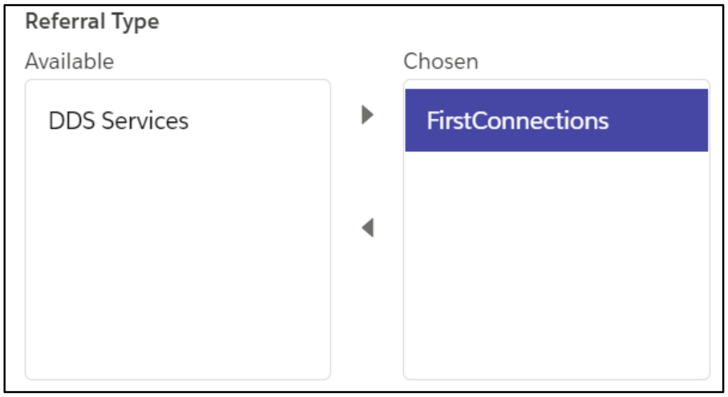
Using the ***AR DDS FC Stands Worker Portal*** and guide assumes that the user has the following prerequisite knowledge:

- Using a Tablet PC, Laptop, or standard desktop computer
- Internet connectivity with one of the following browsers:
  - Google Chrome
  - Edge

2.3 Common User Interface Elements

2.3.1. Multi-select Box

A multi-select box allows the user to make one or multiple selections from a predetermined list of choices. To select an item, click the appropriate record to highlight it and click the appropriate arrow to move the record to the corresponding box. Items displayed in the right box have been chosen and the items in the left box are available.



2.3.2. Dropdown Lists

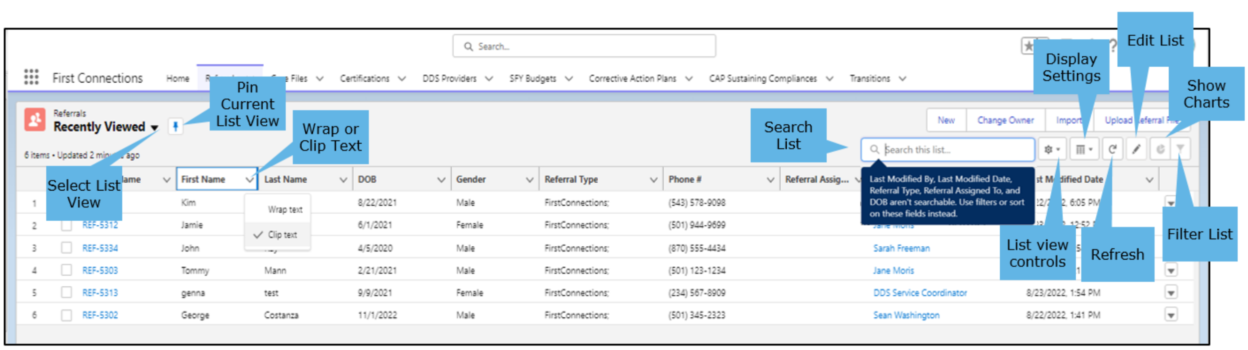
A dropdown list allows the user to choose information from a predetermined list that "drops down" when activated. To select an item, move the mouse pointer to the appropriate item in the list and click it.

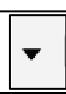
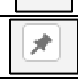
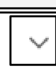
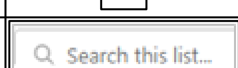
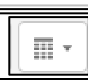
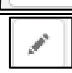
2.3.3. Text Boxes

Text boxes are used to record variable information, and may be either numeric or alpha-numeric, depending on the information being requested. To enter information, tab to or click into the text box and type in the data.

2.3.4. Table Filters

All tables on the ***FC STANDS Referral Application*** list view page have standard filtering and editing capabilities. Please note, some filters vary by user profile.

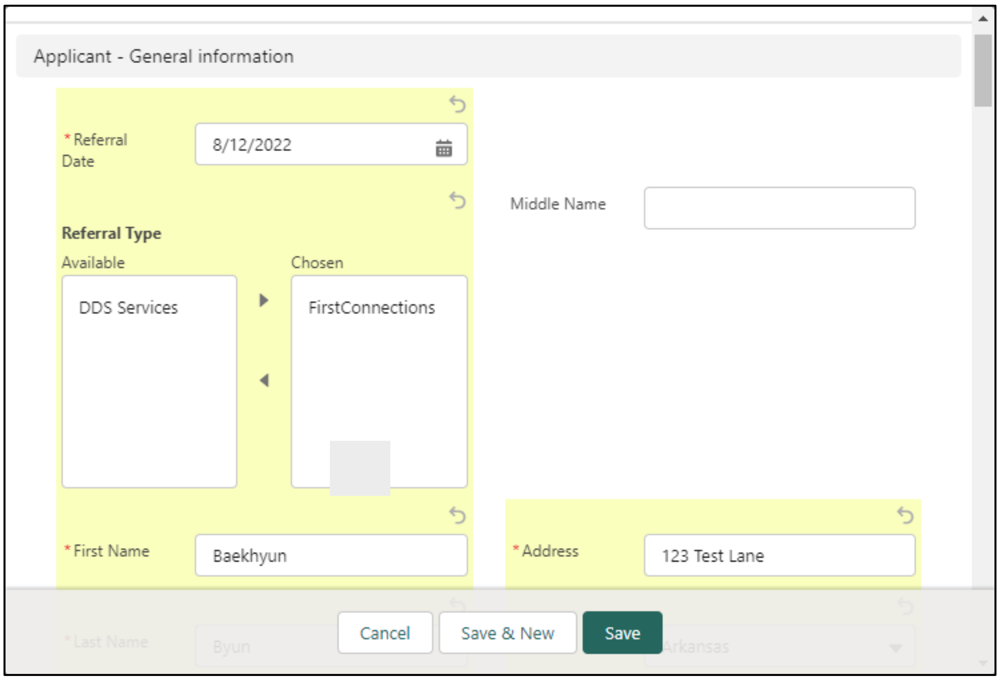


Select a List View		User should be able to select the desired view
Pin Current List View		User to be able to pin the current view as default view
Wrap or Clip Text		User to be able to wrap or clip text, by default one view is already selected
Search List		User to be able to search with filters or fields as search criteria
Display as Table		User to be able to select the display view as needed, default display view is ‘Table’
Edit List		Inline edit is disabled. User to be able to edit or filter by one record type.

List view controls		User to be able to select one of options from the list of view controls and can save the view.
Refresh		Refreshes the whole page and displays the updated list of Facility records
Show charts		User to be able to select a chart from the charts list
Show filters		There is one facility filter by default. User to be able to add filters and remove them as needed

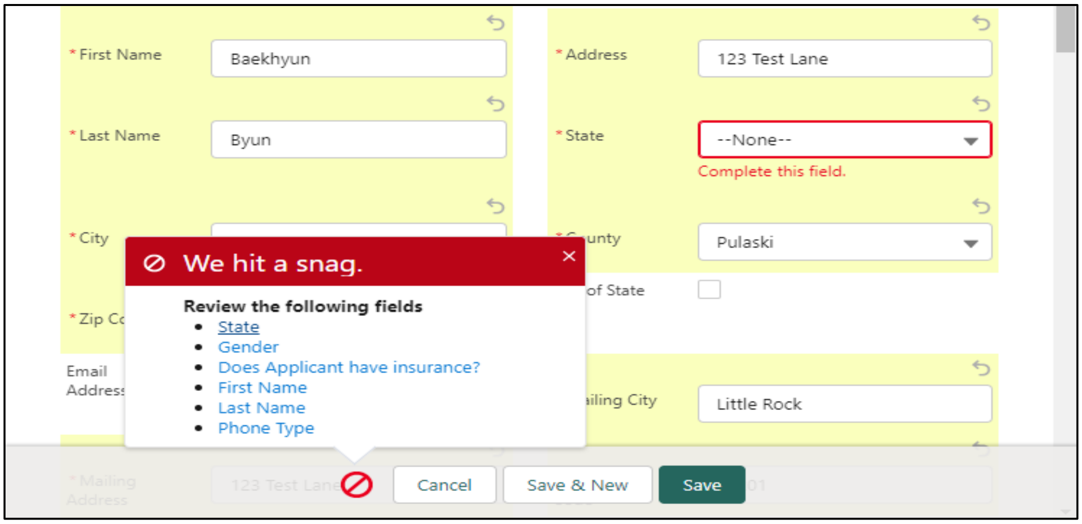
2.3.5. Required Fields

Required field text is indicated by the "*" icon before the field name, which guides the user to enter data into the field.



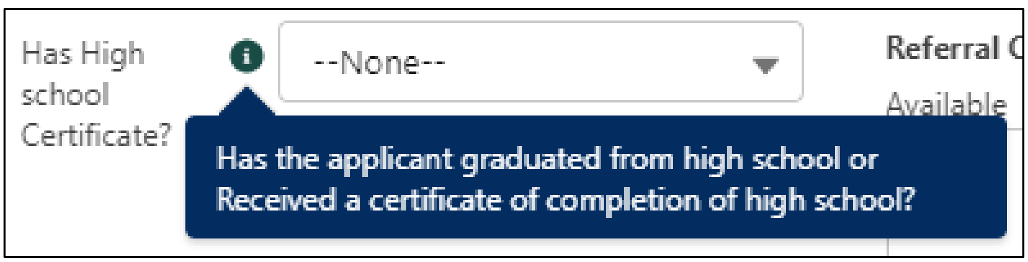
2.3.6. Error Messages

Error messages serve as a prompt for the user to validate a field. Screenshot example of error message:



2.3.7. Help Text

Help text is there to guide user on what a particular field requires. Screenshot of example roll-over help text:



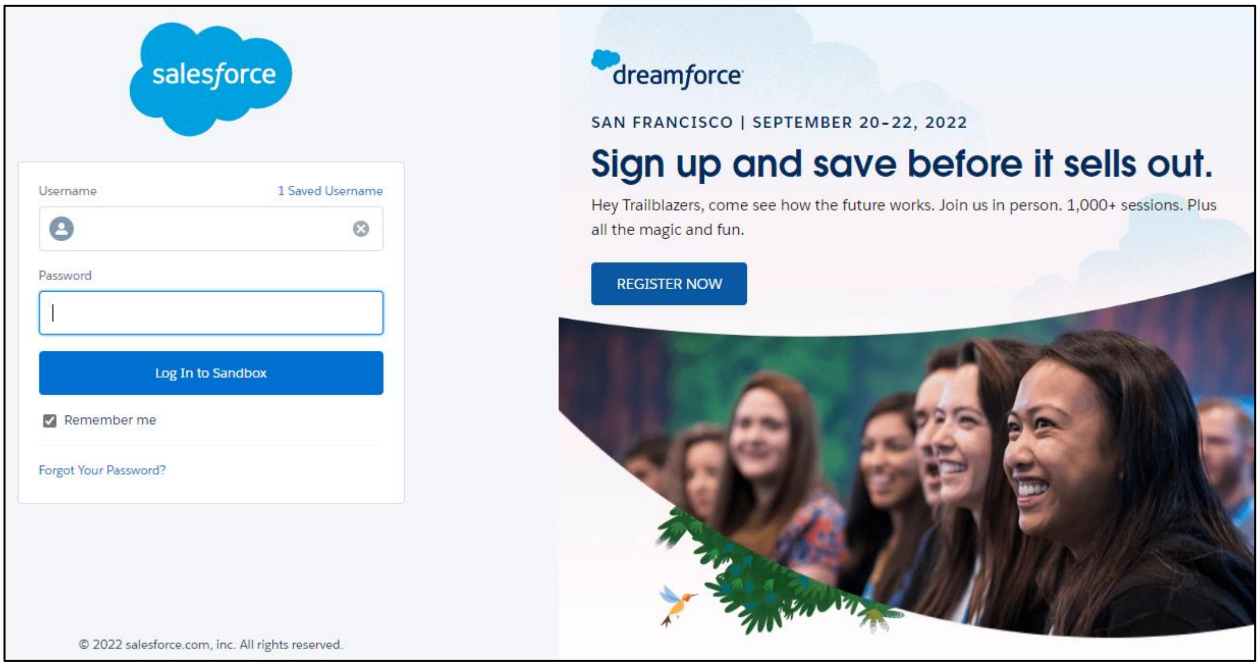
3 Login Page

3.1 Overview

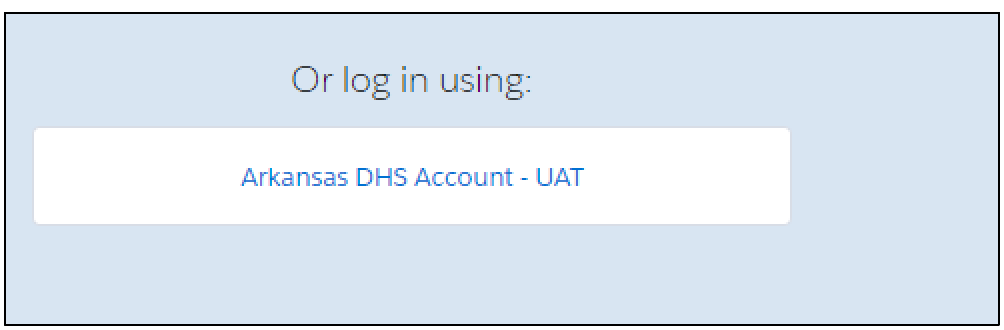
The Login Page is the landing page when the ***AR DDS FC Stands Worker Portal*** is accessed. This page can be reached by anyone who has the URL of the ***AR DDS FC Stands Worker Portal*** and has been provided access into the ***AR DDS FC Stands Worker Portal.***

3.1.1 Screenshot

To log into the ***AR DDS FC Stands Worker Portal***, navigate to the login page:



Click the Arkansas DHS Account link to log in using single sign on feature.



3.1.2 Controls & User Actions

The following table details the controls that are present on the Login Page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Username	User enters their username into this text box.	Mandatory
Password	User enters their password into this text box.	Mandatory
Login to Sandbox	Button that redirects the user to the Caseworker Dashboard Page.	N/A
Remember Me	Clicking this check box saves the Username.	Optional
Forgot Your Password?	Text hyperlink that redirects the user to the Password Reset Page.	Always enabled
Log in using Arkansas DHS Account	Clicking this button will redirect the user to the DHS login page.	Always enabled
Security Usage Disclaimer	Informational text for review.	Always enabled

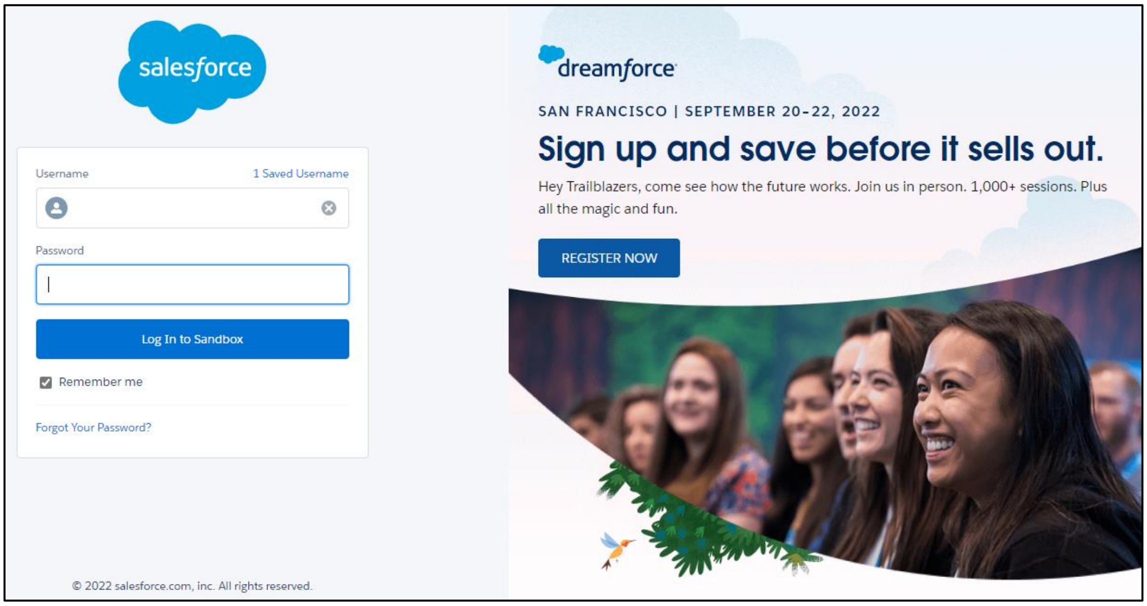
User Action	Description
Login	The user can log in by entering their username and password into the **Username** and **Password** text boxes and then clicking the **Log In** button. The user has the option of saving their username on their computer by clicking the **Remember Me** check box before clicking the **Log In** button.

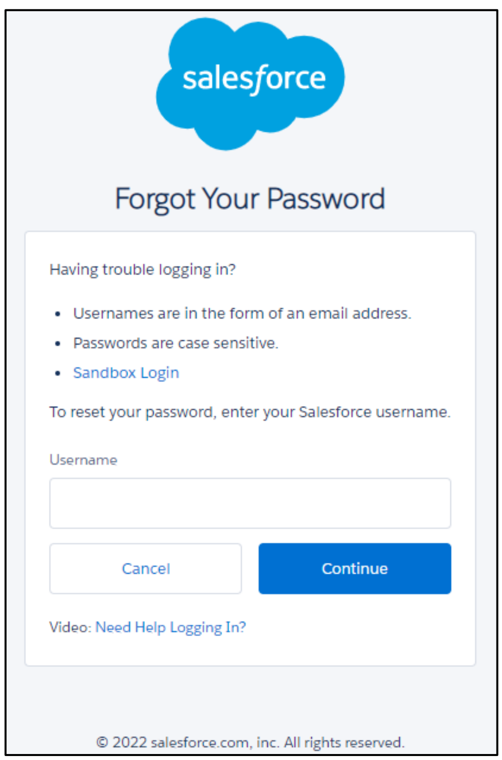
4 Forgot Password

4.1 Overview

The Forgot Password function can be found on the Login Page.

4.1.1 Screenshot





4.1.2 Controls & User Actions

The following table details the controls that are present on the Login Page. Each control includes a description, control type, and user action. Each user action includes a description.

Controls	Description	Control Type
Forgot your password?	Navigates the user to the Reset Password page.	Hyperlink
Username	Enter username in this textbox.	Always enabled
Cancel	Cancel the reset password function.	Always enabled
Continue	Submit reset password request.	Always enabled

User Action	Description
Reset Password	If the user forgets their password, the user can click the **Forgot Password** hyperlink, which will navigate them to the Reset Password page.

5 Home Page

5.1 Overview

The Home page is accessed when the user successfully accesses the ***AR DDS FC Stands Worker Portal***. This page can only be reached by users who are active in the correct Active Directory FIM groups. When the user enters the URL, the application will verify the users FIM account eligibility and will redirect the user to the page.

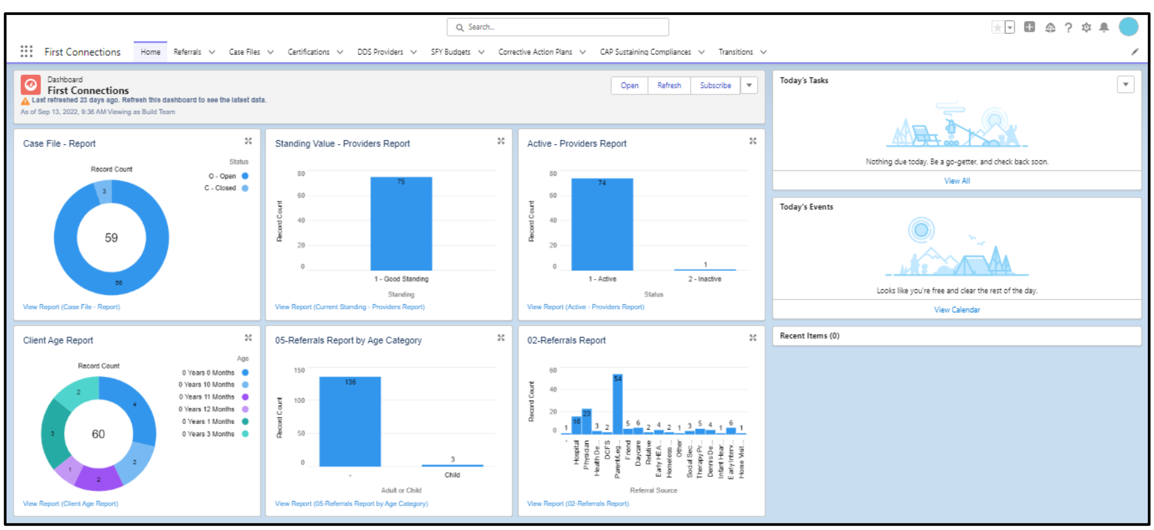
The Home page consists of the following navigation tabs:

- Home
- Referral
- Case Files
- DDS Providers
- SFY Budgets
- Corrective Action Plans
- CAP Sustaining Compliances
- Client, Family, and Other Contacts
- Transitions

The Home page consists of the following tiles:

- Quick Links
- Today’s Tasks
- Today’s Events
- Recent Items
- Case File-Report
- Standing Value-Providers Report
- Active-Providers Report
- Client Age Report
- 05-Referrals Report by Age Category
- 02-Referrrals Report

5.1.1 Screenshot



5.1.2 Controls & User Actions

The following table details the controls that are present on the DDS Home Page. Each control includes a description, control type and user actions. Each user action includes a description.

Controls	Description	Control Type
Quick Links	Text hyperlinks that redirect the user to the respective websites.	Always enabled
Today’s Tasks	Quick view tasks assigned to the user.	Always enabled
Today’s Events	Quick view of any scheduled events on the current day and a hyperlink to View Calendar.	Always enabled
Recent Items	Quick view of items recently viewed.	Always enabled
Case File-Report	Displays record count and status of cases.	Always enabled
Standing Value-Providers Report	Displays record count and standing status of Providers.	
Active-Providers Report	Displays record count and active or inactive status of Providers.	Always enabled
Client Age Report	Displays record count and age category of client.	Always enabled
05-Referrals Report by Age Category	Displays record count and referral by age category.	Always enabled
02-Referrrals Report	Displays record count and the referral source.	Always enabled

User Action	Description
Open	Allows the tiles to open outside of the home page.
Refresh	Allows the page to reload
Subscribe	Allows editing of the frequency, day, and time.

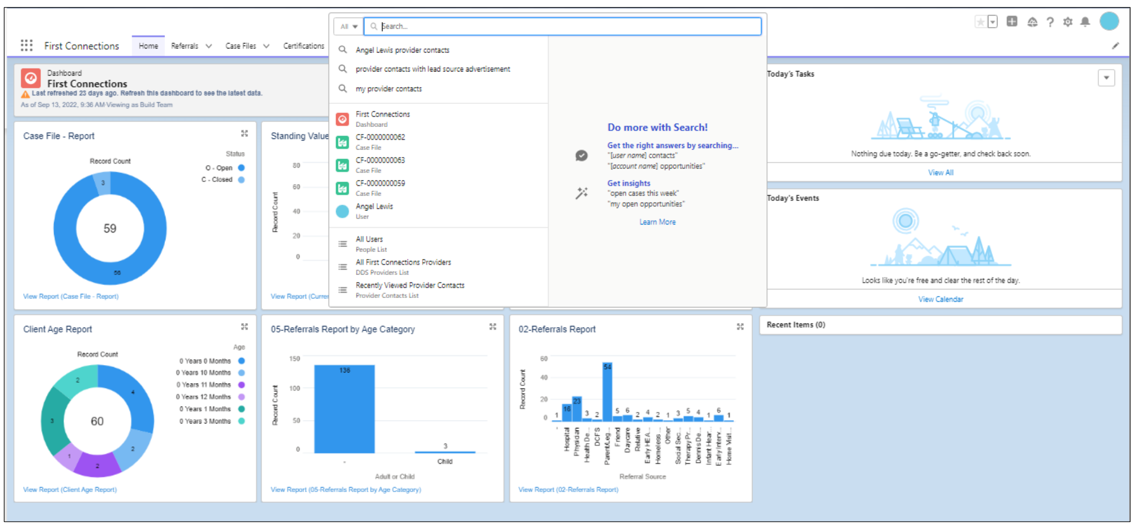
6 Search

6.1 Overview

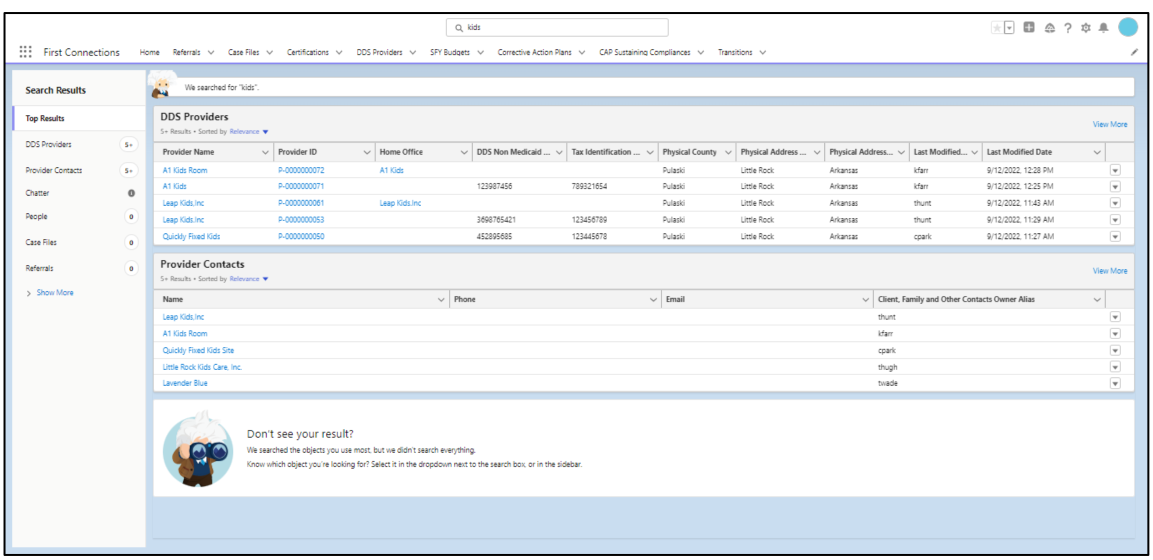
The option to search the ***AR DDS FC Stands Worker Portal*** is displayed at the top of the page, globally throughout the portal. Users have the option to search all records or specify a filter to search for clients, referrals, users, etc. Once the search is entered, a Search Results page will be displayed.

6.1.1 Screenshot

Search Bar:



Search Results:



6.1.2 Controls & User Actions

The following table details the controls that are present on the Search Tasks Page. Each control includes a description, control type, and user actions. Each user action includes a description.

Controls	Description	Control Type
Search Bar	Dropdown list that filters the results by client, user, referral, etc. and a textbox where the user inputs the value of what is being searched.	Always enabled
Search Results	Based on the type of search, the applicable search results will display in a table-like view categorized by Referrals, People, Clients, etc.	Always enabled

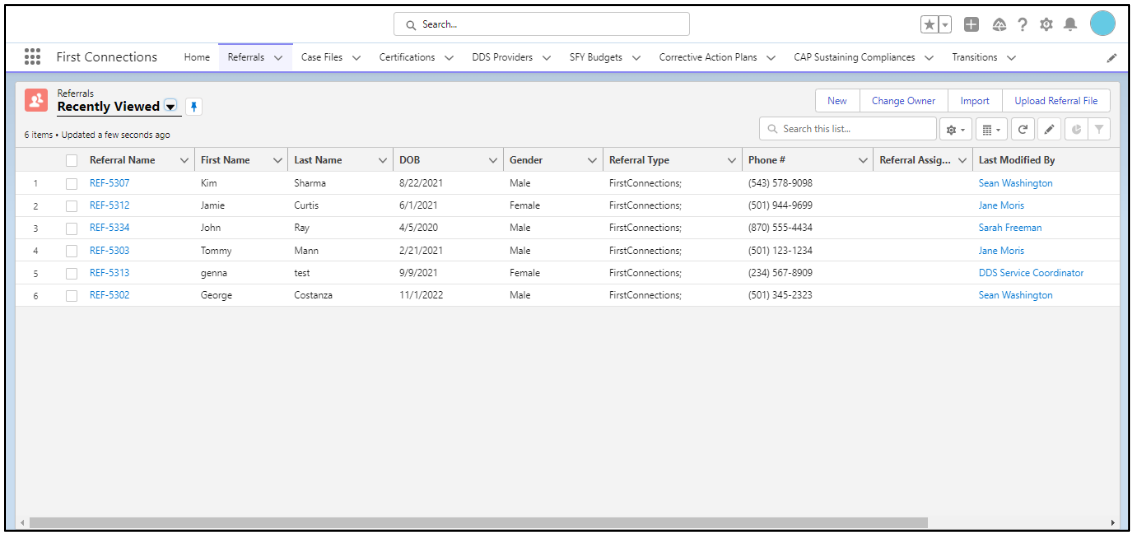
User Action	Description
Search	Search referrals, clients, people, tasks, etc. using the search bar.
View Search Results	View search results in the Search Results Page and filter as desired.

7 Referrals Page

7.1 Overview

The Referrals Page can be accessed by clicking the Referrals tab in the Top Navigation Bar. A list of all referrals can be found on this page. The user is also able to navigate to individual referral records via the Referrals Page.

7.1.1 Screenshot



7.1.2 Controls & User Actions

The following table details the controls that are present on the Referrals page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Edit List View	Dropdown list that displays several options the user can select to modify the selection of referrals viewed in the Referrals table.	Always enabled
New	Opens a pop-up box where users can create a brand-new referral.	Always enabled
Change Owner	Opens a pop-up box where the user can assign a selected referral to another ***DDS Intake*** user.	Conditionally enabled (based on user profile)
Referrals Table	Displays referral records and the corresponding client information.	Always enabled

User Action	Description
Navigation	Navigate to the Referrals Page by clicking on the Referrals tab in the global menu.

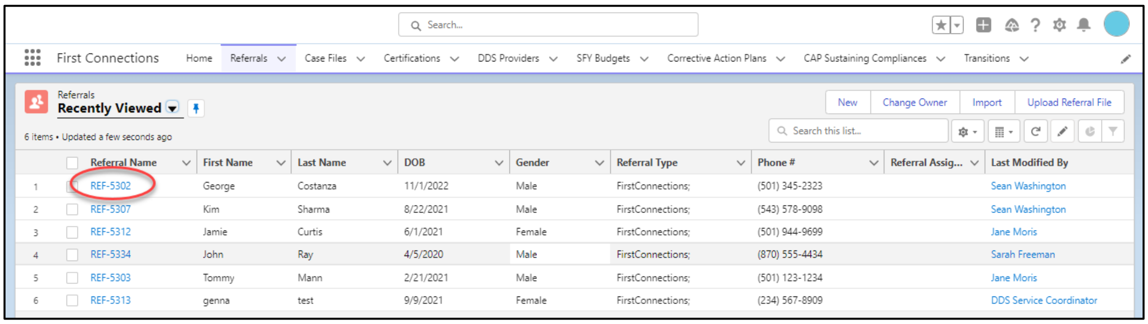
Select List View	Click the  (right of ‘Recently Viewed’ in the screenshot) to open a dropdown list with the following options: - FCS OCR Referral Intake Queue - First Connections - My Referrals - Recently Viewed Select one of these options to display the corresponding referrals in the Referrals Table. Use the  button to make the selected view your default view.
New	Click the “New” button to open a blank form to create a new referral.
Change Owner	Opens a pop-up box where the user can assign a selected referral to another ***DDS Intake*** user.
Upload Referral File	Click the hyperlink to navigate to Upload File (This field is relevant for OCR).
Referrals Table	Click the Referral Number to navigate to the corresponding Referral Details page.

8 Referral Details Page

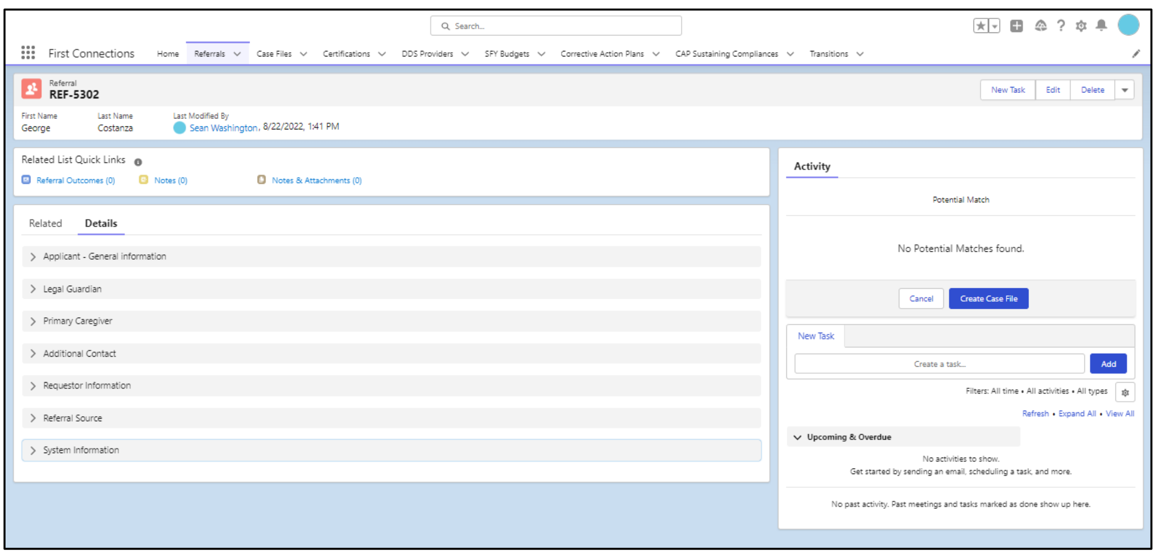
8.1 Overview

The Referral Details page can be accessed by clicking on the Referral Number on the Referral List view. The Referral Details page displays all fields that have been captured via the community portal entries from the public or setup by DDS Staff within the DDS First Connections system.

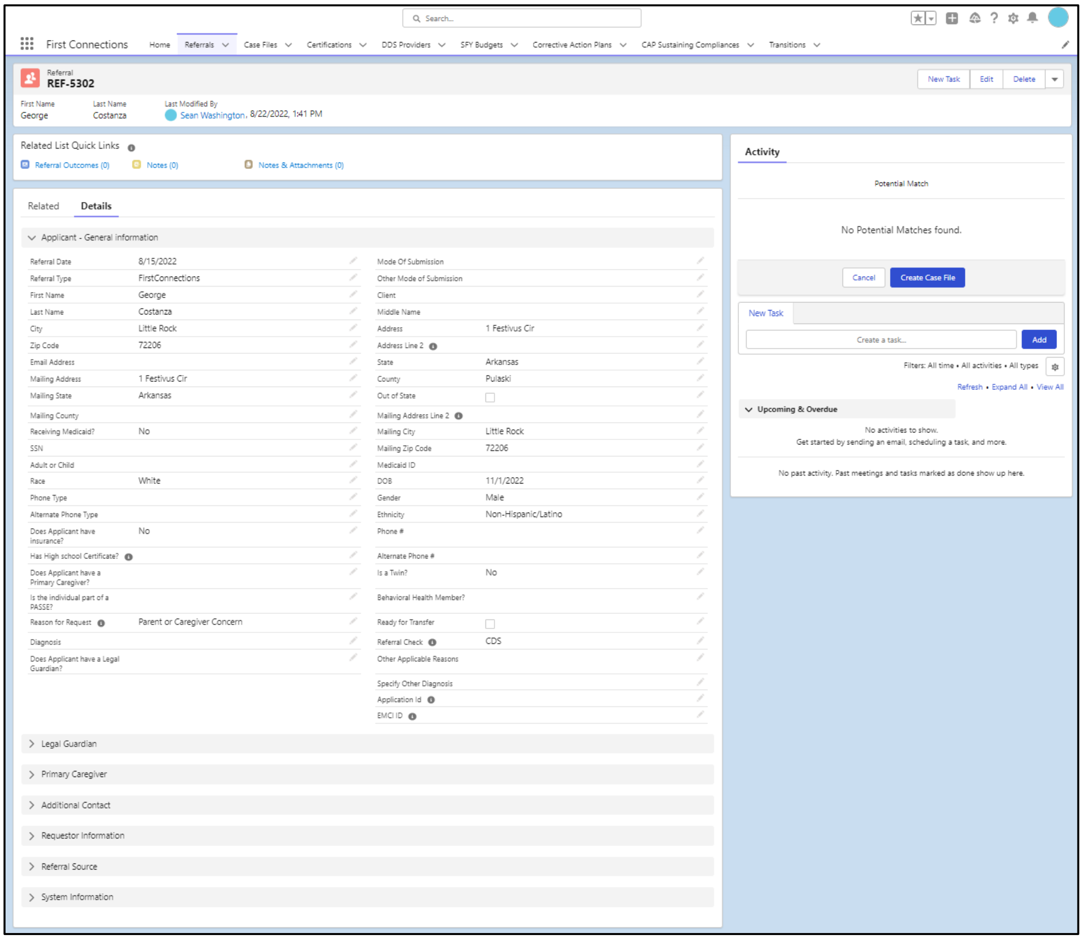
8.1.1 Screenshot



Details sections collapsed:



Details Section – Generation Information Expanded:



8.1.2 Controls & User Actions

The following table details the controls that are present on the Referral Details Page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Edit	Click to enable editing in the referral record.	Button
Printable View	Click to open the referral record in a printable format.	Button
Create Client	Click to open a pop-up window where users can input client information and save to create a new client.	Button
Refer to CDS	Click to send the referral to the DHS CDS system.	Button
Refer to Waiver APC	Click to send the referral to the DHS Waiver APC system.	Button
Referral Outcomes	Navigates the user to a referral outcomes table view.	Hyperlink
Notes	Navigates the user to a notes table view where historical case notes can be viewed, and new case notes can be created.	Hyperlink

Notes & Attachments	Navigates the user to a Notes & Attachments table view where previously uploaded documents can be viewed, and new documents can be uploaded.	Hyperlink
DHS Document Portal	Navigates the user to the external DHS Edoctus website.	Hyperlink
Applicant – General Information Section		
Request Date	Date selection the date the referral request was entered.	Always enabled
Referral Type	Displays the services that are being requested.	Always enabled
First Name	Displays the first name of the person needing services.	Mandatory
Middle Name	Displays the middle name of the person needing services.	Not Mandatory
Last Name	Displays the last name of the person needing services.	Mandatory
Address	Displays the applicant's street address.	Mandatory
City	Displays the applicant's city.	Mandatory
State	Displays the applicant's state.	Mandatory
Zip Code	Displays the applicant's zip code.	Mandatory
County	Displays the County in which the applicant's address resides.	Mandatory
Email Address	Displays the applicant's email address.	Mandatory
Out of State	Displays applicant's address is not in the state of Arkansas.	Not Mandatory
Receiving Medicaid?	Click the Drop-down to indicate whether the applicant is receiving Medicaid.	Not Mandatory
Medicaid ID	Displays the Medicaid number if the applicant is receiving Medicaid.	Not Mandatory
SSN	Displays the applicant's Social Security Number.	Not Mandatory
DOB	Displays the applicant's date of birth. Click the calendar icon to make date selection.	Mandatory
Adult or Child	Click the Drop-down indicate whether the applicant is an adult or a child.	Mandatory
Gender	Click the Drop-down to select the applicant's gender.	Mandatory
Race	Click the Drop-down to select the applicant's race.	Mandatory
Ethnicity	Click the Drop-down to select the applicant's ethnicity.	Mandatory
Phone Type	Click the Drop-down to indicate the applicant's type of phone.	Not Mandatory
Phone #	Displays the applicant's phone number.	Not Mandatory

Alternate Phone Type	Click the Drop-down to select type if an alternate phone number is available for the applicant.	Not Mandatory
Alternate Phone #	Displays the applicant's alternate phone number.	Not Mandatory
Does Applicant have insurance?	Click the Drop-down to indicate whether the applicant has insurance.	Mandatory
Is a twin?	Click the Drop-down to indicate whether the applicant is a twin.	Mandatory
Has high school certificate?	Click the Drop-down to indicate whether the applicant has received a high school certificate.	Not Mandatory
Does Applicant have a Primary Caregiver?	Click the Drop-down to indicates whether the applicant has a primary caregiver.	Not Mandatory
Behavioral Health Member?	Click the Drop-down to indicate whether the applicant is a behavioral health member.	Not Mandatory
Is the individual part of a PASSE?	Click the Drop-down to indicate whether the applicant is part of a PASSE.	Not Mandatory
Ready to transfer	Click the Drop-down to indicate the referral is ready to be transferred to CDS or WAPC	Not Mandatory
Reason for Request	Click the Drop-down to indicate the reason for which the applicant is requesting services.	Not Mandatory
Other Applicable Reasons	Displays the if 'Other' is selected in the Reason for Request menu, the reason for request is entered here.	Not Mandatory
Referral Check	Click and select from multi-select menu. If applicable, indicates the DHS system the referral will be sent to (i.e., CDS or Waiver APC).	Not Mandatory
Does Applicant have a Legal Guardian?	Click the Drop-down to indicate whether the applicant has a legal guardian.	Not Mandatory
Diagnosis	Click the Drop-down to select the applicant's diagnosis.	Not Mandatory
Specify Other Diagnosis	Displays the if 'Other' is selected in the Diagnosis menu, the diagnosis is entered here.	Not Mandatory
Legal Guardian Section		
Primary Caregiver?	Click the Drop-down to indicate whether the applicant's legal guardian is their primary caregiver.	Mandatory
Guardian Type	Click the Drop-down to indicate the applicant's type of legal guardian.	Not Mandatory
Relationship	Click the Drop-down to select Yes/No.	Not Mandatory
Relationship Type	Displays the Legal guardian's relationship with the applicant.	Not Mandatory
First Name	Displays the Legal guardian's first name.	Mandatory
Middle Name	Displays the Legal guardian's middle name.	Not Mandatory

Last Name	Displays the Legal guardian’s last name.	Mandatory
Legal Status	Click the Drop-down to indicate the status of the applicant’s legal guardianship.	Not Mandatory
Address same as Applicant?	Click the Drop-down to indicate whether the legal guardian’s address is the same as the applicants.	Not Mandatory
Address	Displays the Legal guardian’s address.	Mandatory
City	Displays the Legal guardian’s city.	Mandatory
State	Click the Drop-down menu to select Legal guardian’s state. Arkansas is the default state.	Mandatory
Zip Code	Displays the Legal guardian’s zip code.	Mandatory
County	Click the Drop-down to select Legal guardian’s county.	Mandatory
Out of State	Check the checkbox if the legal guardian’s address is not in the state of Arkansas.	Not Mandatory
Phone Type	Click the Drop-down to indicate the type of the legal guardian’s phone.	Not Mandatory
Phone #	Displays the Legal guardian’s phone number.	Mandatory
Ext	Displays the phone number extension number if applicable.	Not Mandatory
Fax	Displays the Legal guardian’s fax number.	Not Mandatory
Email Address	Displays the Legal guardian’s email address.	Not Mandatory
Primary Caregiver Section		
First Name	Displays the applicant’s primary caregiver first name.	Not Mandatory
Middle Name	Displays the Primary caregiver’s middle name.	Not Mandatory
Last Name	Displays the Primary caregiver’s last name.	Not Mandatory
Address same as Applicant?	Click the Drop-down to indicate whether the primary caregiver’s address is the same as the applicants.	Not Mandatory
Address	Displays the Primary caregiver’s address.	Not Mandatory
City	Displays the Primary caregiver’s city.	Not Mandatory
State	Click the Drop-down to select Primary caregiver’s state.	Not Mandatory
Zip Code	Displays the Primary caregiver’s zip code.	Not Mandatory
County	Click the Drop-down to select the county in which the primary caregiver’s address resides.	Not Mandatory
Out of State	Check the checkbox if the legal guardian’s address is not in the state of Arkansas.	Not Mandatory
Phone Type	Click the Drop-down to indicate the primary caregiver’s type of phone.	Not Mandatory
Phone #	Displays the Primary caregiver’s phone number.	Not Mandatory

Ext	Displays the phone number extension number if applicable.	Not Mandatory
Fax	Displays the Primary caregiver’s fax number.	Not Mandatory
Email Address	Displays the Primary caregiver’s email address.	Not Mandatory
Additional Contact Section		
Is there an additional contact person?	Click the Drop-down to indicate whether the applicant has an additional contact person.	Conditionally Mandatory
First Name	Displays the Additional contact’s first name.	Conditionally Mandatory
Middle Name	Displays the Additional contact’s middle name.	Conditionally Mandatory
Last Name	Displays the Additional contact’s last name.	Conditionally Mandatory
Address	Displays the Additional contact’s address.	Conditionally Mandatory
City	Displays the Additional contact’s city.	Conditionally Mandatory
State	Click the Drop-down to select Additional Contact’s state.	Conditionally Mandatory
Zip Code	Displays the Additional contact’s zip code.	Conditionally Mandatory
County	Click the Drop-down to select County in which the additional contact’s address resides.	Conditionally Mandatory
Out of State	Check the checkbox if the legal guardian’s address is not in the state of Arkansas.	Conditionally Mandatory
Email Address	Displays the Additional contact’s email address.	Conditionally Mandatory
Phone Type	Click the Drop-down to indicate the additional contact’s type of phone.	Conditionally Mandatory
Phone #	Displays the Additional contact’s phone number.	Conditionally Mandatory
Ext	Displays the phone number extension number if applicable.	Conditionally Mandatory
Requestor Information Section		
First Name	Displays the Requestor’s first name.	Not Mandatory
Middle Name	Displays the Requestor’s middle name.	Not Mandatory
Last Name	Displays the Requestor’s last name.	Not Mandatory
Email Address	Displays the Requestor’s email address.	Not Mandatory
Phone Type	Click the Drop-down to indicate the additional contact’s type of phone.	Not Mandatory

Phone #	Displays the Requestor's phone number.	Not Mandatory
Ext	Displays the phone number extension number if applicable.	Not Mandatory
Referral Source Section		
Referral Source	Displays the documented Referral Source.	Mandatory
Priority Source	Click the Drop-down to indicate the priority source of the referral.	Not Mandatory
Referral Source – Other Option Explain	Displays if 'Other' is selected as the referral source, the referral source is entered here.	Not Mandatory
EIDT Enrollment Status	Click the Drop-down to indicate the applicant's Early Intervention Day Treatment application status.	Conditionally Mandatory
Received First Connections Handout?	Click the Drop-down to indicates whether the applicant has received the first connections handout.	Conditionally Mandatory
Owner	This is system generated and displays the ***DDS Intake*** System user to whom the referral is currently assigned.	System-Generated
System Information Section		
Transferred to CDS By	This is system generated if applicable; this field displays the ***DDS Intake*** System user who transferred the referral to the CDS system.	Read Only
Transferred to Waiver APC By	This is system generated if applicable; this field displays the ***DDS Intake*** System user who sent the referral to the Waiver APC system.	Read Only
Transferred to CDS Date/Time	This is system generated if applicable; this field displays the date and time the referral was sent to the CDS system.	Read Only
Transferred to Waiver APC Date/Time	This is system generated if applicable; this field displays the date and time the referral was sent to the Waiver APC system.	Read Only
CDS Referral ID	This field is System-generated.	Read Only
Waiver Case ID	This field is System-generated.	Read Only
Created By	This field is System-generated.	Read Only
Last Modified By	Text displays the name, date, and time of the user who last modified the client record.	Read Only

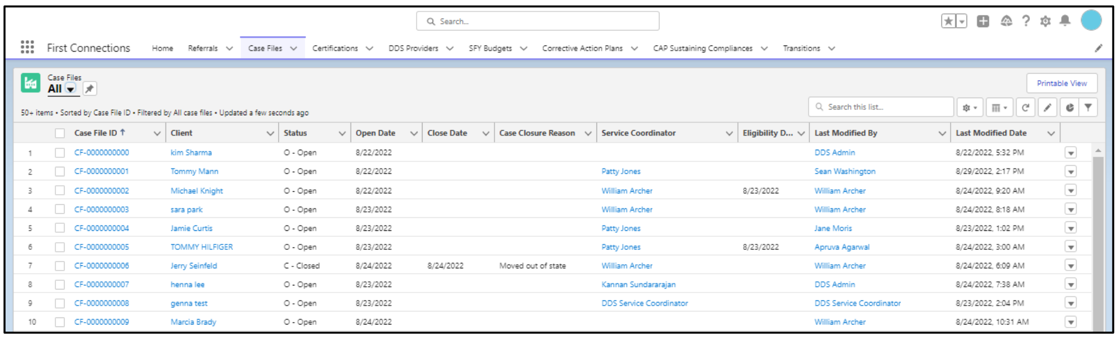
User Action	Description
Cancel	This button deletes any changes made to the referral Record and closes the Edit view of the record.
Save	This button saves any changes made to the referral record and closed the Edit view of the record.

9 Case Files

9.1 Overview

The Case File Page displays all cases associated to a referral. Details such as referral status and application status can be found here. Additionally, the user can navigate to view outcome details in the Meeting Setup and Outcome section in the related links for more information.

9.1.1 Screenshot



9.1.2 Controls & User Actions

The following table details the controls that are present on the Case Files Page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Case Files	The table displays all cases and details associated with the case.	Always enabled
List View Table	The table displays the list of cases in the AR D***DS First Connections Worker Portal*** and their following information: - Case File ID - Client Name - Status - Open Date - Close Date - Case Closure Reason - Service Coordinator - Eligibility Determination Date - Last Modified By - Last Modified Date	Always enabled

User Action	Description
Search	Click in the textbox to search for case.
List View Controls	Click button to list view controls.
Display as Table	Click to change display table view.

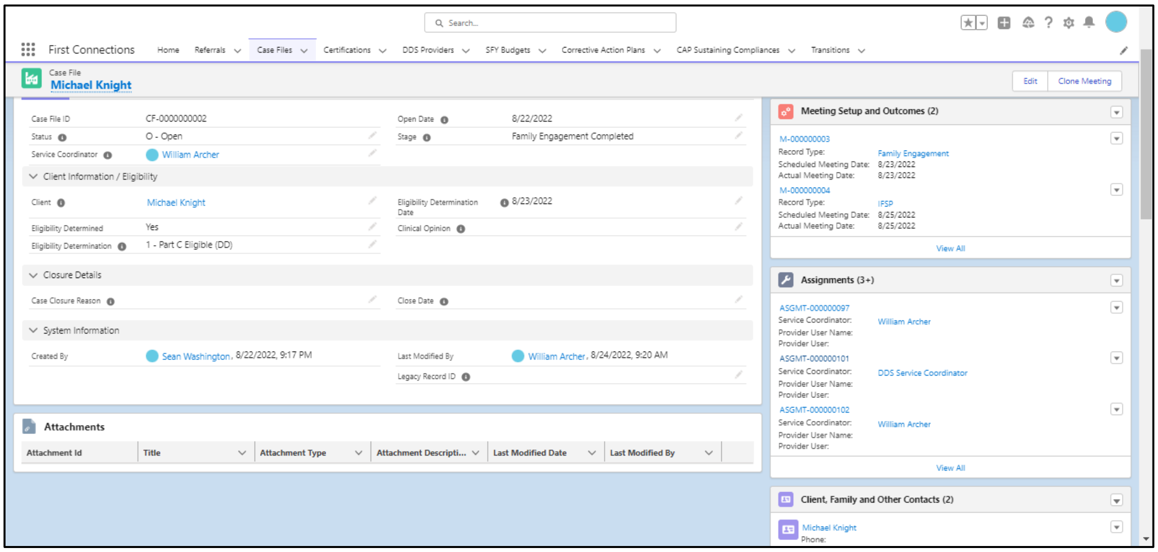
Refresh	Click to refresh page
Edit List	Click to edit case list.
Show Chart	Click to show chart
Filter	Click to filter list.
Printable view	Click to print list view page.

10 Case File Details Page

10.1 Overview

The Case File Page displays detailed information about outcomes and any associated information in determining the outcome.

10.1.1 Screenshot



10.1.2 Controls & User Actions

The following table details the controls that are present on the Case File Details Page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Case File Header		
Case File ID	Displays the Case File Referral ID.	System-Generated
Status	Click the dropdown to select the status	Mandatory
Client	Displays the name of the client.	System-Generated
Open Date	Displays the date case file is opened.	System-Generated
Eligibility Determined	Click dropdown to make selection.	Not Mandatory
Eligibility Determination Date	Displays the date decision was made about a client’s eligibility.	Not Mandatory
Eligibility Determination	Displays determination of client’s eligibility.	Not Mandatory

Service Coordinator	Displays the name of the Service Coordinator.	Mandatory
Clinical Opinion	Displays the clinical opinion.	Not Mandatory
Stage	Displays the case file’s current state.	System-Generated
Close Date	Displays the date the case file was closed.	Not Mandatory
Case Closure Reason	Displays the reason the case file was closed.	Conditionally Mandatory
Legacy Record ID	Displays if record is converted from legacy system.	System-Generated
System Information		
Created By	Displays the name, date, and time of the user who created the outcome record.	System-Generated
Last Modified By	Displays the name, date, and time of the user who last modified the outcome record.	System-Generated

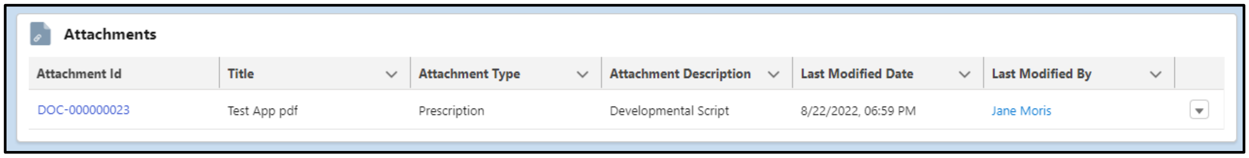
User Action	Description	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled

11 Attachments

11.1 Overview

The Attachments Related Link displays all documents uploaded for a Case.

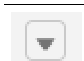
11.1.1 Screenshot



11.1.2 Controls & User Actions

The following table details the controls that are present in the Attachments section. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Attachment ID	Click the hyperlink to preview document.	System Generated
Title	Displays the Title of document.	Read-Only
Attachment Type	Displays the document Attachment Type.	Read-Only
Attachment Description	Displays the document Attachment Description.	Read-Only
Last Modified Date	Displays the documents Last Modified Date.	Read-Only
Last Modified By	Displays name of person who Last Modified document.	Read-Only

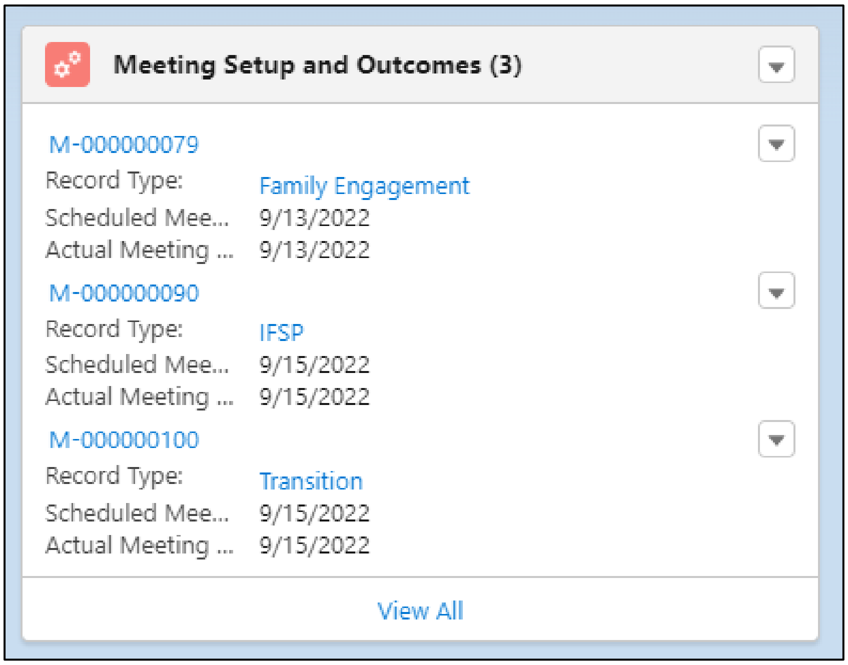
User Action	Description	
	Click drop-down button to download or delete attachment.	Always Enabled

12 Meeting Setup and Outcomes

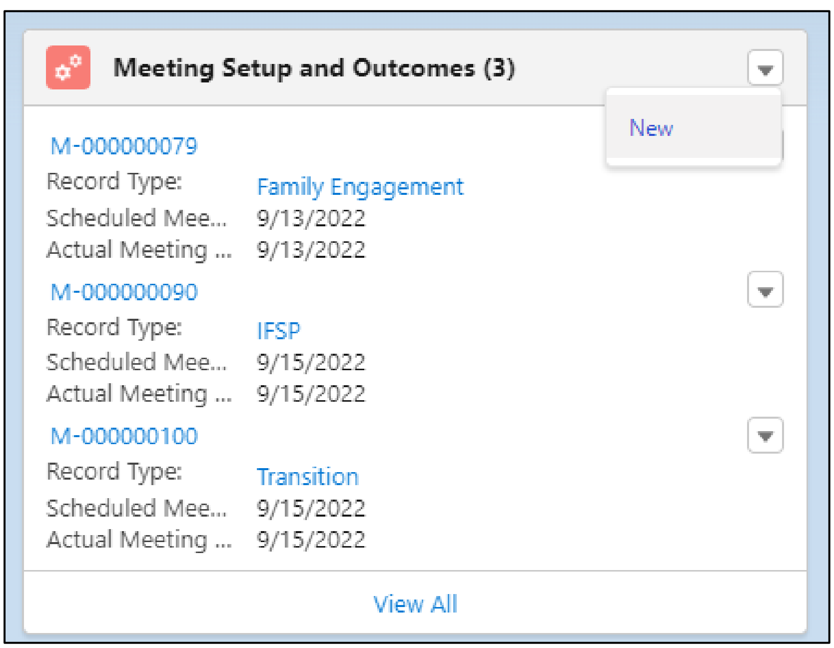
12.1 Overview

The Meeting Setup and Outcomes Related Link displays all meetings and outcomes for a Case.

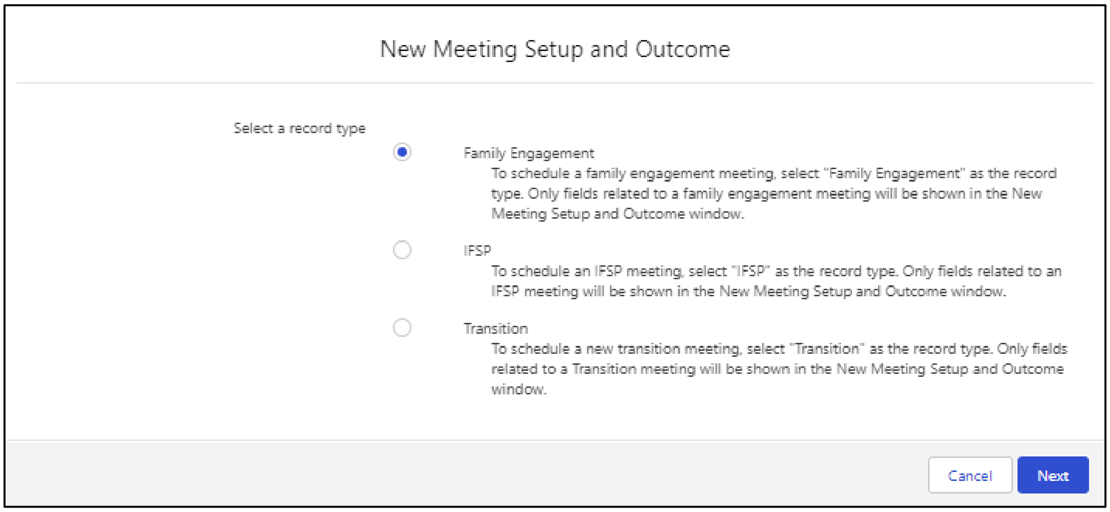
12.1.1 Screenshot



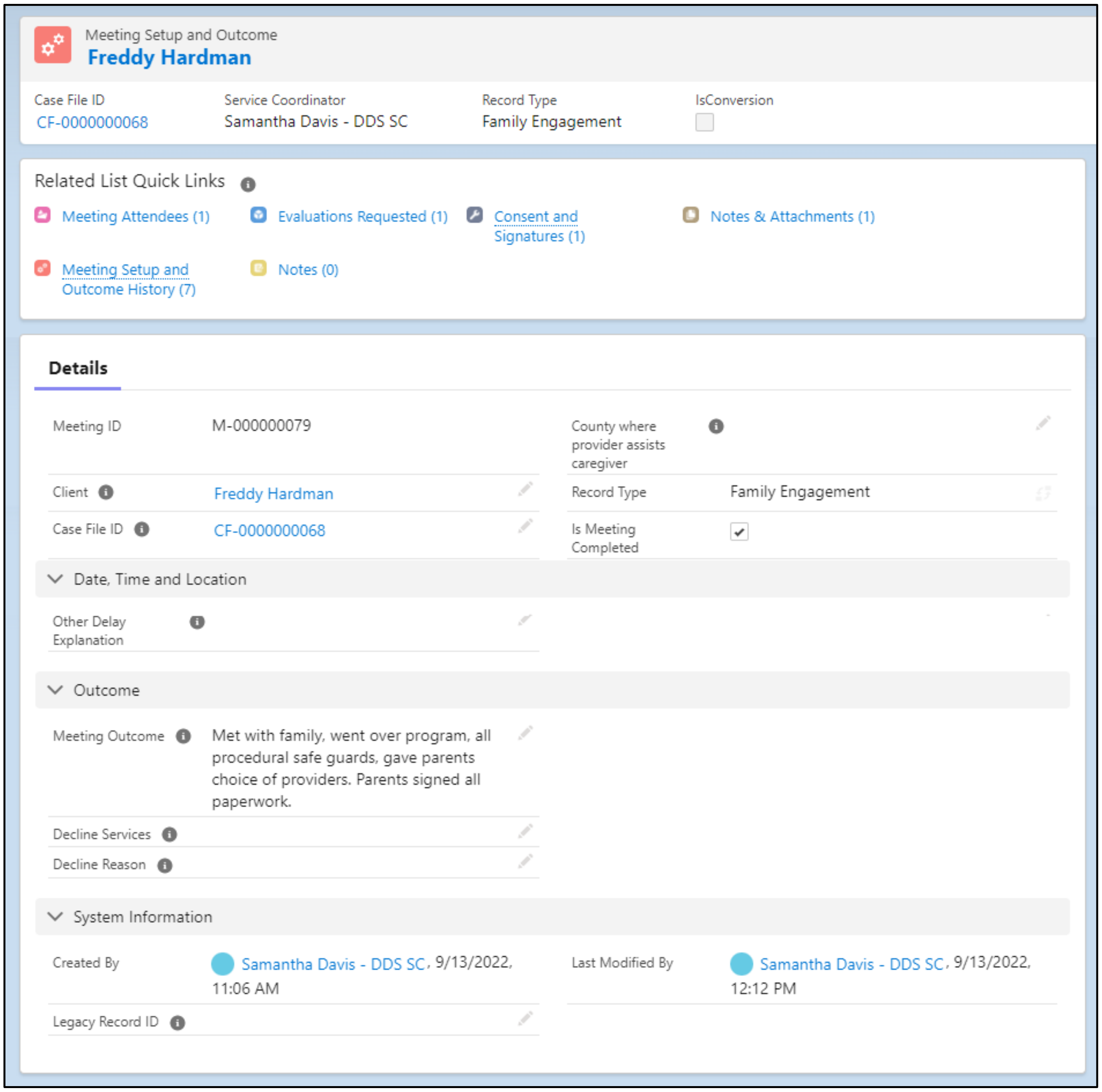
To schedule a meeting, select “New” from the dropdown menu.



On the New Meeting Setup and Outcome pop-up window, select the radio button next to the meeting record type and click Next.



12.1.2 Controls & User Actions - Family Engagement



The following table details the controls that are present in the Meeting Setup and Outcomes - Family Engagement meeting details. Each control includes a description and control type. Each user action includes a description.

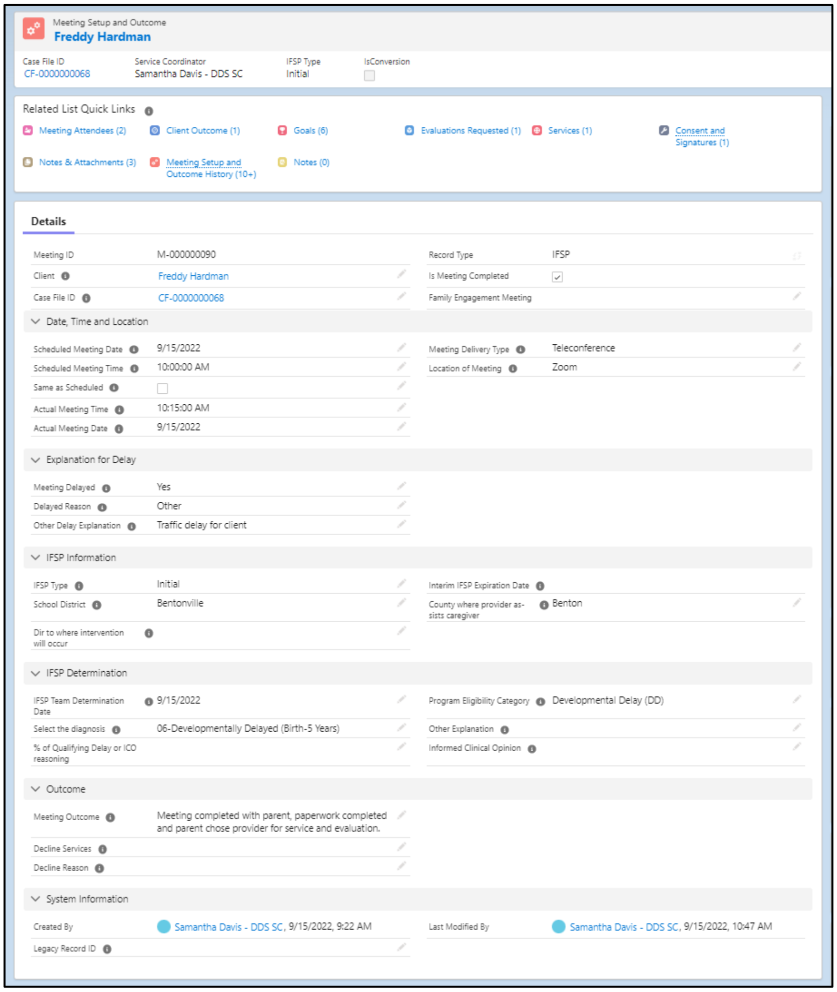
Controls	Description	Control Type
Details		
Meeting ID	Assigned when record is saved.	System-Generated
County where provider assists caregiver	Click the drop-down menu to make selection.	Mandatory
Client	Pre-populates with client’s name.	Pre-populated
Record Type	Assigned based on Record Type selected.	System-Generated

Case File ID	Number assigned to Case by system.	System-Generated
Is Meeting Completed	This field is calculated upon save.	System-Generated
Date, Time and Location		
Scheduled Meeting Date	Click the calendar icon to make date selection.	Mandatory
Meeting Delivery Type	Click the drop-down menu to make selection.	Not Mandatory
Scheduled Meeting Time	Click the clock icon to make time selection.	Mandatory
Location of Meeting	Click in the textbox to enter location details.	Not Mandatory
Same as Scheduled	Click the checkbox when meeting takes place.	Same as Scheduled
Actual Meeting Time	Click the clock icon to make time selection.	Not Mandatory
Actual Meeting Date	Click the clock icon to make time selection.	Not Mandatory
Explanation for Delay		
Meeting Delayed	Click the drop-down menu to make selection.	Not Mandatory
Delayed Reason	Click the drop-down menu to make selection.	Not Mandatory
Other Delay Explanation	Click in the textbox to enter location details.	Not Mandatory
Outcome		
Meeting Outcome	Click in the textbox to enter location details.	Not Mandatory
Decline Services	Click the drop-down menu to make selection.	Not Mandatory
Decline Reason	Click the drop-down menu to make selection.	Not Mandatory
System Information		
Created By	Assigned by system with creator's name.	System-Generated
Last Modified By	Assigned by system of who last edited the record.	System-Generated
Legacy Record ID	Assigned if converted from legacy system.	System-Generated

User Action	Description	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled

Save & New	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and open a new meeting record.	Always Enabled

12.1.3 Controls & User Actions - IFSP



The following table details the controls that are present in the Meeting Setup and Outcomes - IFSP meeting details. Each control includes a description and control type. Each user action includes a description.

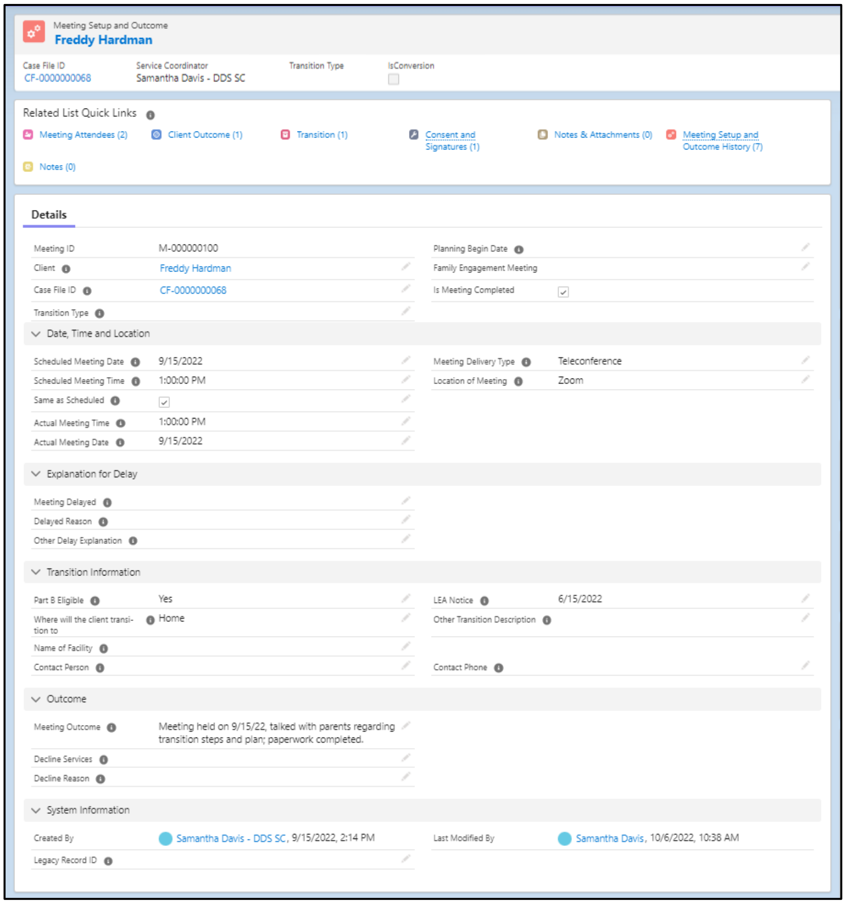
Controls	Description	Control Type
Information		
Meeting ID	Assigned when record is saved.	System-Generated
Record Type	Assigned based on Record Type selected.	System-Generated
Client	Click the lookup icon to make a selection.	Not Mandatory
Family Engagement Meeting	Click the lookup icon to make a selection.	Not Mandatory
Case File ID	Number assigned to Case by system.	System-Generated
Date, Time and Location		

Scheduled Meeting Date	Click the calendar icon to make a date selection.	Mandatory
Meeting Delivery Type	Click the drop-down menu to make selection.	Mandatory
Scheduled Meeting Time	Click the clock icon to make a time selection.	Mandatory
Location of Meeting	Click in the textbox to enter location details.	Not Mandatory
Same as Scheduled	Click the checkbox when meeting takes place.	Not Mandatory
Actual Meeting Time	Click the clock icon to make a time selection.	Not Mandatory
Actual Meeting Date	Click the calendar icon to make a date selection.	Not Mandatory
Explanation for Delay		
Meeting Delayed	Click the drop-down menu to make selection.	Not Mandatory
Delayed Reason	Click the drop-down menu to make selection.	Not Mandatory
Other Delay Explanation	Click in the textbox to enter details.	Not Mandatory
IFSP Information		
IFSP Type	Click the drop-down menu to make selection.	Mandatory
County where provider assists caregiver	Click the drop-down menu to make selection.	Mandatory
School District	Click the drop-down menu to make selection.	Not Mandatory
Dir to where intervention will occur	Click in the textbox to enter details.	Not Mandatory
IFSP Determination		
IFSP Team Determination Date	Click the clock icon to make time selection.	Not Mandatory
Program Eligibility Category	Click the drop-down menu to make selection.	Not Mandatory
Select the diagnosis	Make selection from the multi-select list.	Not Mandatory
Other Explanation	Click in the textbox to enter details.	Not Mandatory
% of Qualifying or ICO reasoning	Click in the textbox to enter details.	Not Mandatory
Informed Clinical Opinion	Click in the textbox to enter details.	Not Mandatory
Outcome		

Meeting Outcome	Click in the textbox to enter details.	Not Mandatory
Decline Services	Click the drop-down menu to make selection.	Not Mandatory
Decline Reason	Click in the textbox to enter details.	Not Mandatory
System Information		
Created By	Displays the name of person who created record.	System-Generated
Last Modified By	Displays the name of person who last modified record.	System-Generated
Legacy Record ID	Assigned if converted from legacy system.	System-Generated

User Action	Description	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save & New	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and open a new meeting record.	Always Enabled

12.1.4 Controls & User Actions - Transition



The following table details the controls that are present in the Meeting Setup and Outcomes - Transition meeting details. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Details		
Meeting ID	Assigned when record is saved.	System-Generated
Planning Begin Date	Click the calendar icon to make date selection.	Not Mandatory
Client	Name of child referred to First Connections program.	Hyperlink
Family Engagement Meeting	Click the lookup icon to make selection.	Not Mandatory
Case File ID	Number assigned to Case by system.	System-Generated
Is Meeting Completed	This field is calculated upon save.	System-Generated
Transition Type	Click the drop-down menu to make selection.	Not Mandatory
Date, Time and Location		

Scheduled Meeting Date	Click the calendar icon to make date selection.	Mandatory
Meeting Delivery Type	Click the drop-down menu to make selection.	Mandatory
Scheduled Meeting Time	Click the clock icon to make time selection.	Mandatory
Location of Meeting	Click in the textbox to enter location details.	Not Mandatory
Same as Scheduled	Click the checkbox when meeting takes place.	Not Mandatory
Actual Meeting Time	Click the clock icon to make time selection	Not Mandatory
Actual Meeting Date	Click the calendar icon to make time selection.	Not Mandatory
Explanation for Delay		
Meeting Delayed	Click the drop-down menu to make selection.	Not Mandatory
Delayed Reason	Click the drop-down menu to make selection.	Not Mandatory
Other Delay Explanation	Click in the textbox to enter details.	Not Mandatory
Transition Information		
Part B Eligible	Click the drop-down menu to make selection.	Mandatory
LEA Notice	Click the calendar icon to make time selection.	Not Mandatory
Where will the client transition to	Click the drop-down menu to make selection.	
Other Transition Description	Click in the textbox to enter details.	Not Mandatory
Name of Facility	Click in the textbox to enter details.	Not Mandatory
Contact Person	Click in the textbox to enter details.	Not Mandatory
Contact Phone	Click in the textbox to enter details.	Not Mandatory
Outcome		
Meeting Outcome	Click in the textbox to enter details.	Not Mandatory
Decline Services	Click the drop-down menu to make selection.	Not Mandatory
Decline Reason	Click in the textbox to enter details.	Not Mandatory
System Information		
Created By	Displays the name of person who created record.	System-Generated
Last Modified By	Displays the name of person who last modified record.	System-Generated
Legacy Record ID	Assigned if converted from legacy system.	System-Generated

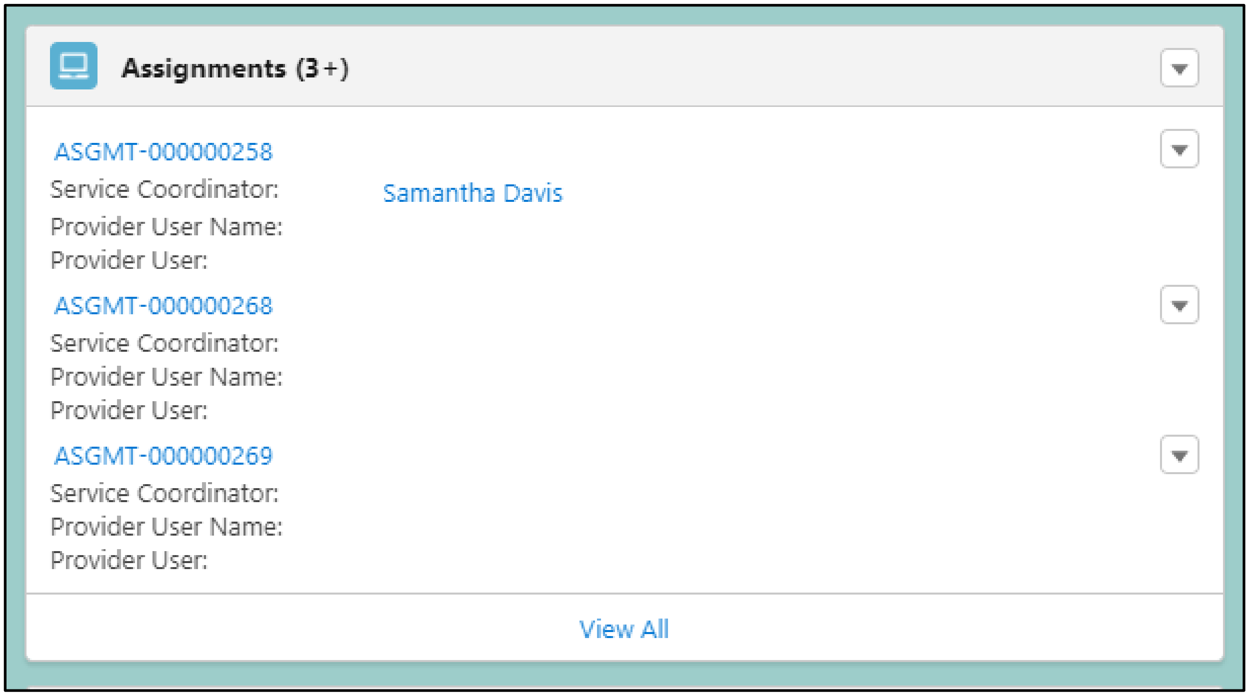
User Action	Description	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save & New	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and open a new meeting record.	Always Enabled

13 Assignments

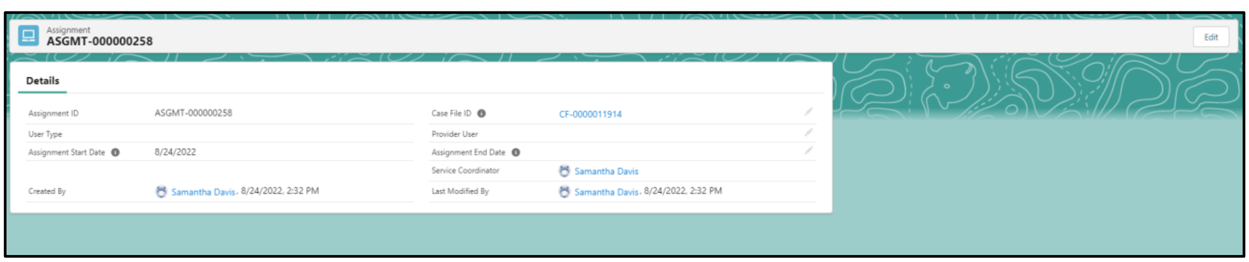
13.1 Overview

The Assignments Related Link displays all assignments for a Case.

13.1.1 Screenshot



13.1.2 Controls & User Actions



The following table details the controls that are present in the Attachments section. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Details		
Assignment ID	Assigned by the system upon save.	Not Mandatory
Case File ID	Number assigned to Case by system.	System-Generated
User Type	Assigned by the system.	Not Mandatory

Provider User	Click the lookup icon ad make selection.	Not Mandatory
Assignment Start Date	Click the calendar icon and make date selection.	Not Mandatory
Assignment End Date	Click the calendar icon and make date selection.	Mandatory
Service Coordinator	Assigned by the system.	Not Mandatory
System Information		
Created By	Displays the name of person who created record.	System-Generated
Last Modified By	Displays the name of person who last modified record.	System-Generated

User Action	Description	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save & New	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and open a new meeting record.	Always Enabled

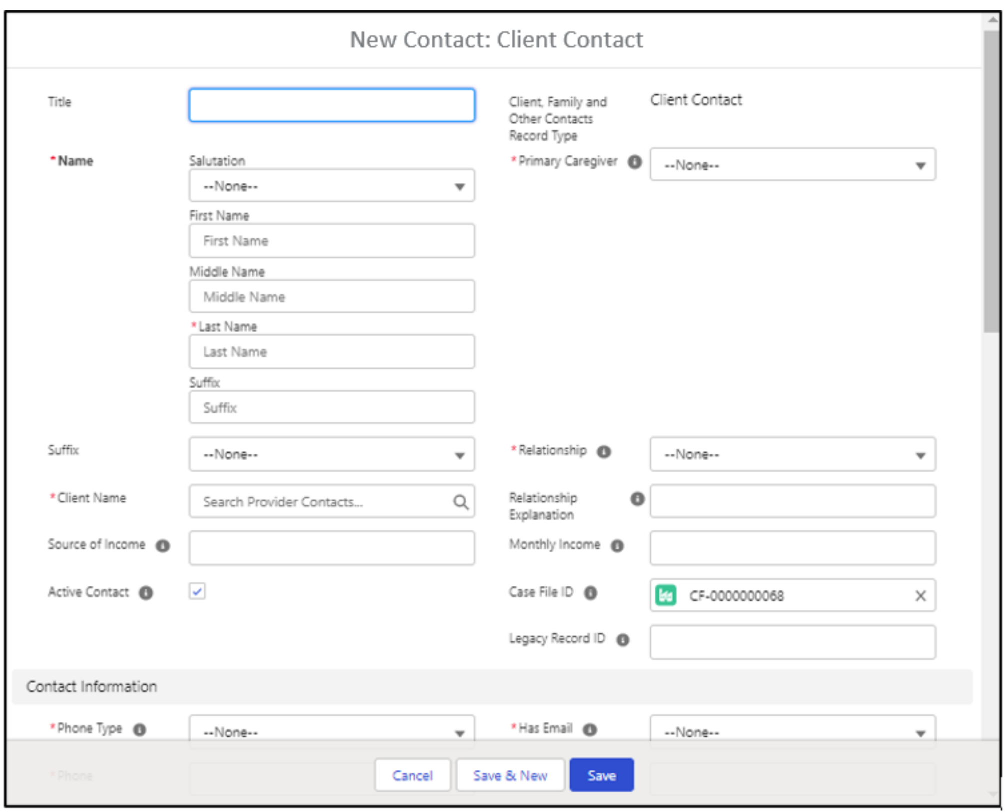
14 Client, Family, and Other Contacts

14.1 Overview

The Client, Family, and Other Contacts page displays contacts connected to the case.

14.1.1 Screenshot

14.1.2 Screenshot – Client Contact



14.1.2.1 Controls & User Actions

The following table details the controls that are present on the Client Contact record. Each control includes a description and control type. Each user action includes a description.

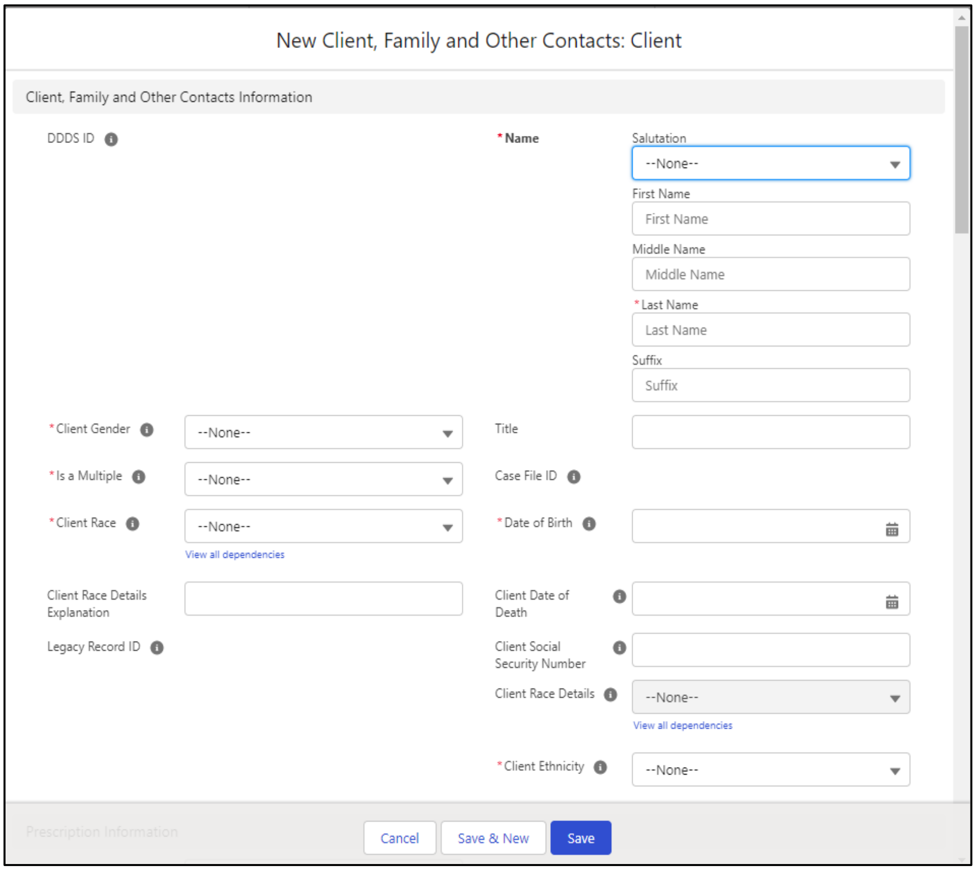
Controls	Description	Control Type
Title	Click in the textbox and document information.	Not Mandatory
Client, Family and Other Contacts Record Type	Displays the selected record type	System Generated
Name	Click in the textbox and enter information for the following fields - Salutation - First Name - Middle Name - Last Name - Suffix	Mandatory
Primary Caregiver	Click the dropdown menu and make selection.	Mandatory
Suffix	Click the dropdown menu and make selection.	Not Mandatory
Relationship	Click the dropdown menu and make selection.	Mandatory
Client Name	Click in the lookup field and enter information.	Mandatory
Other Relationship Explanation	Click in the textbox and enter information.	Not Mandatory
Source of Income	Click in the textbox and enter information.	Not Mandatory
Monthly Income	Click in the textbox and enter information.	Not Mandatory
Active Contact	Displays active if the person is an active contact; would not display if the person is inactive.	System Generated
Case File ID	Displays the case file number associated with the client.	Not Mandatory
Legacy Record ID	Displays only if the record was converted from the Legacy application.	System Generated
Contact Information		
Phone Type	Click the dropdown menu and make selection.	Mandatory
Has Email	Click the dropdown menu and make selection.	Mandatory
Phone	Click in the textbox and enter information.	Mandatory
Email	Click in the textbox and enter information.	Not Mandatory
Work Phone Ext	Click in the textbox and enter information.	Not Mandatory
Contact Method Preference	Click the dropdown menu and make selection.	Mandatory
Work Phone	Click in the textbox and enter information.	Not Mandatory

Contact Frequency Preference	Click the dropdown menu and make selection.	Not Mandatory
Alternate Contact		
Alternate Contact Name	Click in the textbox and enter information.	Not Mandatory
Alternate Contact Number	Click in the textbox and enter information.	Not Mandatory
Physical Address		
Physical Address Same as Client	Click the checkbox if applicable.	Not Mandatory
Physical Address 1	Click in the textbox and enter information.	Conditionally Mandatory
Physical Address 2	Click in the textbox and enter information.	Conditionally Mandatory
Physical City	Click in the textbox and enter information.	Conditionally Mandatory
Physical State	Click the dropdown menu and make selection.	Conditionally Mandatory
Physical County	Click the dropdown menu and make selection.	Conditionally Mandatory
Physical Zip Code	Click in the textbox and enter information.	Conditionally Mandatory
Mailing Address		
Mailing Addr Same as Physical Addr	Click the checkbox if applicable.	Not Mandatory
Mailing Addr Same as Client Mailing Addr	Click the checkbox if applicable.	Not Mandatory
Mailing Address 1	Click in the textbox and enter information.	Conditionally Mandatory
Mailing Address 2	Click in the textbox and enter information.	Conditionally Mandatory
Mailing City	Click in the textbox and enter information.	Conditionally Mandatory
Mailing State	Click the dropdown menu and make selection.	Conditionally Mandatory
Mailing County	Click the dropdown menu and make selection.	Conditionally Mandatory
Mailing Zip Code	Click in the textbox and enter information.	Conditionally Mandatory

Language		
Primary Language Spoken at Home	Click the dropdown menu and make selection.	Mandatory
Other Language Description	Click in the textbox and enter information.	Not Mandatory
Interpreter Needed	Click the dropdown menu and make selection.	Mandatory
Additional Information		
Directions to intervention	Click in the text area and enter information.	Not Mandatory
System Information		
Provider Name	Click in the lookup field and enter information.	

User Action	Description
Cancel	Click the cancel button if you wish to leave the page and not save any information.
Save & New	Click the save & new button if you wish to save the information and open a new window.
Save	Click the save button if you wish to save the information and remain on the page.

14.1.3 Screenshot – Client



14.1.3.1 Controls & User Actions

The following table details the controls that are present on the Client page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Client, Family and Other Contacts Record Type		
DDDS ID	Displays the system-generated DDDS ID number.	System Generated
Name	Click in the textbox and enter information for the following fields - Salutation - First Name - Middle Name - Last Name - Suffix	Mandatory
Client Gender	Click the drop-down menu to select client’s gender.	Mandatory
Title	Click in the textbox and enter title.	Not Mandatory
Is a Multiple	Click the dropdown to make selection	Mandatory

Case File ID	Displays the case file number associated with the client.	Not Mandatory
Client Race	Click the dropdown to select client race.	Mandatory
Date of Birth	Click the calendar icon to make date selection.	Mandatory
Client Race Details Explanation	Click in the textbox and enter information.	Not Mandatory
Client Date of Death	Click the dropdown and select the client race details.	Not Mandatory
Legacy Record ID	Displays only if the record was converted from the Legacy application.	Not Mandatory
Client Social Security Number	Click in the textbox to enter the client's SSN.	Not Mandatory
Client Race Details	Click in the textbox and enter information.	Not Mandatory
Client Ethnicity	Click the dropdown and select the client's ethnicity.	Mandatory
Prescription Information		
Client has a prescription	Click the dropdown and make selection.	Mandatory
Prescription Type	Click the selection from the multi-select picklist.	Not Mandatory
Prescription Date	Click the calendar icon and make date selection.	Not Mandatory
Physical Address		
Physical County	Click the drop-down to make County selection.	Mandatory
Physical Address	Click in the text box to enter physical address.	Mandatory
Physical Address 2	Click in the text box to enter addition physical address details.	Not Mandatory
Physical City	Click in the text box to enter City.	Mandatory
Physical State	Click the drop-down to select State.	Mandatory
Physical Zip Code	Click in the text box to enter Zip Code	Mandatory
Mailing Address		
Mailing Address Same as Physical Address	Click the checkbox if the mailing and physical address are the same.	Mandatory
Mailing Address	Click in the text box to enter mailing address.	Conditionally Mandatory
Mailing Address 2	Click in the text box to enter addition mailing address details.	Conditionally Mandatory
Mailing City	Click in the text box to enter City.	Conditionally Mandatory

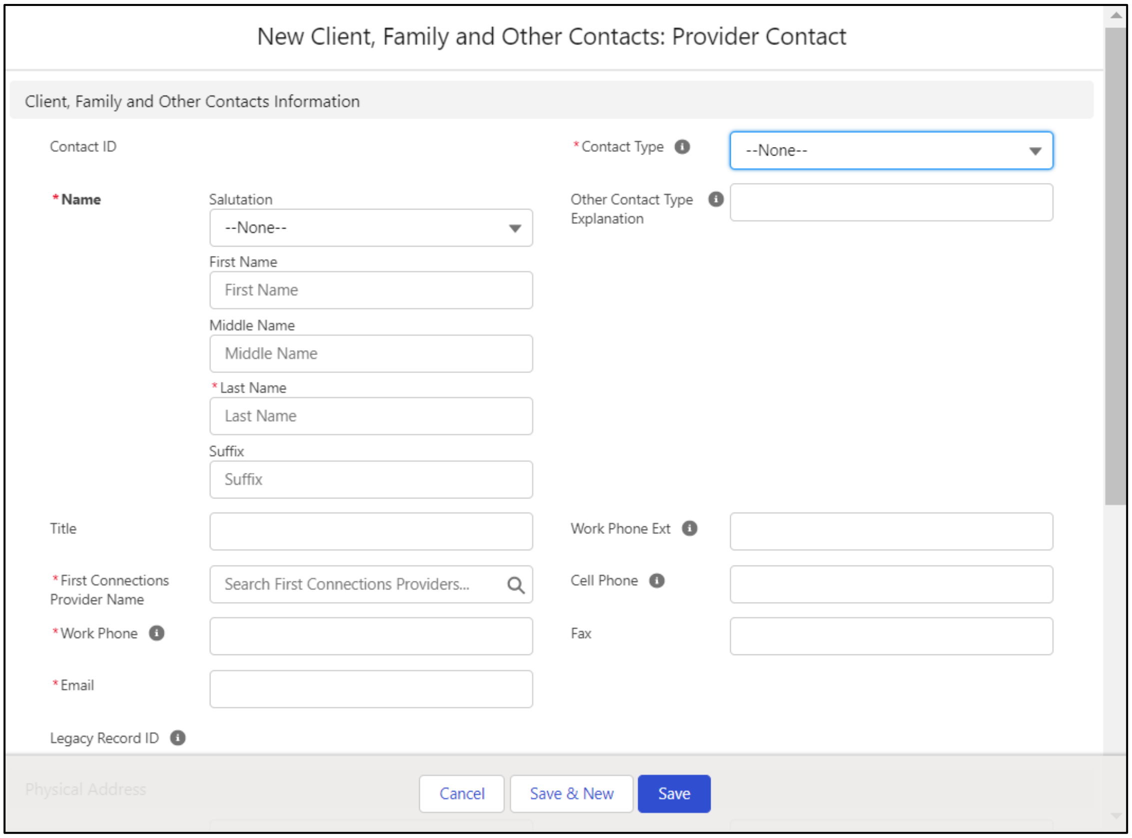
Mailing State	Click the drop-down to select State.	Conditionally Mandatory
Mailing County	Click the drop-down to select County.	Conditionally Mandatory
Mailing Zip Code	Click in the text box to enter Zip Code.	Conditionally Mandatory
Medical Information		
Policyholder Name	Click in the textbox and enter information.	
Insurance	Click the dropdown menu and make selection.	Mandatory
Policyholder Relationship to Client	Click the dropdown menu and make selection.	Not Mandatory
Client Insurance Number	Click in the textbox and enter information.	Not Mandatory
Policyholder Date of Birth	Click the calendar icon and make date selection.	Not Mandatory
Plan Name	Click in the textbox and enter information.	Not Mandatory
Group Number	Click in the textbox and enter information.	Not Mandatory
Client Medicaid Number	Click in the textbox and enter information.	Not Mandatory
Member Number	Click in the textbox and enter information.	Not Mandatory
Insurance Company Name	Click in the textbox and enter information.	Not Mandatory
Policyholder Mailing Address 1	Click in the textbox and enter information.	Not Mandatory
Policyholder Mailing Address 2	Click in the textbox and enter information.	Not Mandatory
Policyholder City	Click in the textbox and enter information.	Not Mandatory
Policyholder State	Click the dropdown menu and make selection.	Not Mandatory
Policyholder Zip Code	Click in the textbox and enter information.	Not Mandatory
Effective Date	Click the calendar icon and make date selection.	Not Mandatory
Insurance Company Claim 1	Click in the textbox and enter information.	Not Mandatory
Insurance Company Claim 2	Click in the textbox and enter information.	Not Mandatory
Insurance Company Claim City	Click in the textbox and enter information.	Not Mandatory

Insurance Company Claim State	Click the dropdown menu and make selection.	Not Mandatory
Insurance Company Claim Zip Code	Click in the textbox and enter information.	Not Mandatory
Insurance Company Phone	Click in the textbox and enter information.	Not Mandatory
Employer Name	Click in the textbox and enter information.	Not Mandatory
Employer Address 1	Click in the textbox and enter information.	Not Mandatory
Employer 2	Click in the textbox and enter information.	Not Mandatory
Employer Address City	Click in the textbox and enter information.	Not Mandatory
Employer Address State	Click the dropdown menu and make selection.	Not Mandatory
Employer Address Zip Code	Click in the textbox and enter information.	Not Mandatory
Copay	Click in the textbox and enter information.	Not Mandatory
Copay Amount	Click in the textbox and enter information.	Not Mandatory
Deductible	Click in the textbox and enter information.	Not Mandatory
Medical Diagnosis		
Interim IFSP required	Click the dropdown menu and make selection.	Mandatory
Any Med Diagnosis likely to result in DD	Click in the selection area and make selection.	Not Mandatory
Other Explanation	Click in the textbox and enter information.	Not Mandatory
Developmental Screening Completed	Click in the selection area and make selection.	Not Mandatory
Physician Information		
Primary Care Physician Name	Click in the textbox and enter information.	Not Mandatory
Primary Care Physician Clinic Name	Click in the textbox and enter information.	Not Mandatory
Physician Email	Click in the textbox and enter information.	Not Mandatory
Primary Care Physician Contact Pref	Click the dropdown menu and make selection.	Not Mandatory

Primary Care Physician City	Click in the textbox and enter information.	Not Mandatory
Primary Care Physician Fax	Click in the textbox and enter information.	Not Mandatory
Primary Care Physician Phone Number	Click in the textbox and enter information.	
System Information		
First Connections Provider Name	Click in the lookup field and enter information.	

User Action	Description
Cancel	Click the cancel button if you wish to leave the page and not save any information.
Save & New	Click the save & new button if you wish to save the information and open a new window.
Save	Click the save button if you wish to save the information and remain on the page.

14.1.4 Screenshot – Provider Contact



14.1.4.1 Controls & User Actions

The following table details the controls that are present on the Provider Contact record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Client, Family and Other Contacts Record Type		
Contact ID	Displays the system-generated Contact ID number.	System Generated
Contact Type	Click the dropdown menu and make selection.	Mandatory
Name	Click in the textbox and enter information for the following fields - Salutation - First Name - Middle Name - Last Name - Suffix	Mandatory
Title	Click in the textbox and enter title.	Not Mandatory
Work Phone Ext	Click in the textbox and enter information.	Not Mandatory

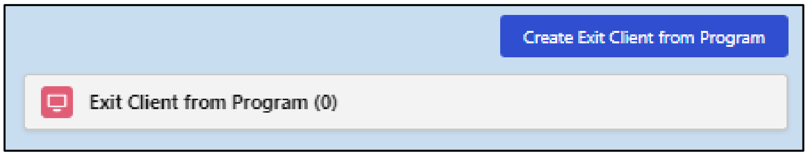
First Connections Provider Name	Click the dropdown menu and make selection.	Mandatory
Cell Phone	Click in the textbox and enter information.	Not Mandatory
Work Phone	Click in the textbox and enter information.	Mandatory
Fax	Click in the textbox and enter information.	Not Mandatory
Email	Click in the textbox and enter information.	Mandatory
Legacy Record ID	Displays only if the record was converted from the Legacy application.	System-Generated
Physical Address		
Physical Address 1	Click in the text box to enter physical address.	Mandatory
Physical Address 2	Click in the text box to enter addition physical address details.	Not Mandatory
Physical City	Click in the text box to enter City.	Mandatory
Physical State	Click the drop-down to select State.	Mandatory
Physical Zip Code	Click in the text box to enter Zip Code	Mandatory
Physical County	Click the drop-down to make County selection.	Mandatory
Mailing Address		
Mailing Address Same as Physical Address	Click the checkbox if the mailing and physical address are the same.	Mandatory
Mailing Address 1	Click in the text box to enter mailing address.	Conditionally Mandatory
Mailing Address 2	Click in the text box to enter addition mailing address details.	Conditionally Mandatory
Mailing City	Click in the text box to enter City.	Conditionally Mandatory
Mailing State	Click the drop-down to select State.	Conditionally Mandatory
Mailing County	Click the drop-down to select County.	Conditionally Mandatory
Mailing Zip Code	Click in the text box to enter Zip Code.	Conditionally Mandatory

15 Exit Client from Program

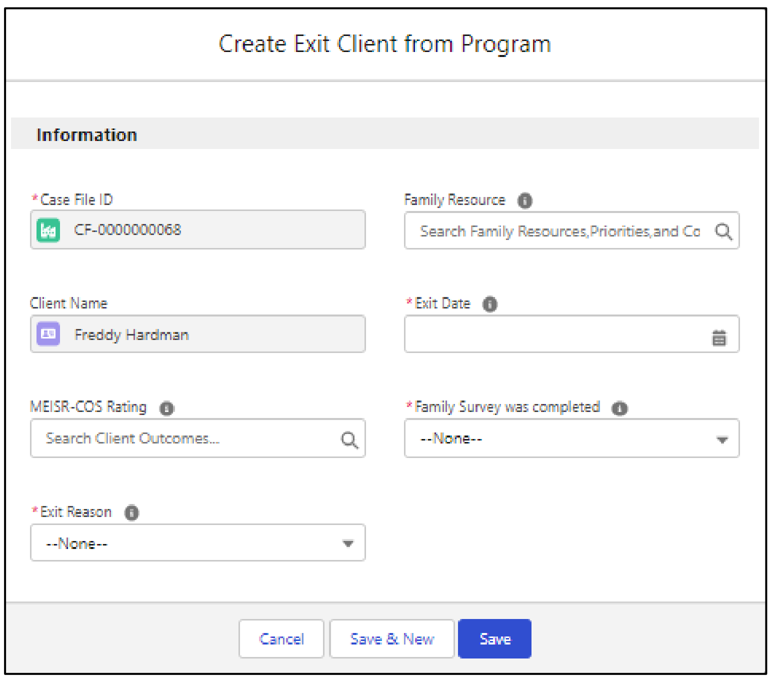
15.1 Overview

The Exit Client from Program record displays exit criteria when a client leaves the EI program.

15.1.1 Screenshot



When the Exit Client from Program button is selected, document information in the required fields.



15.1.2 Controls & User Actions

The following table details the controls that are present in the Exit Client from Program record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Client Header		
Case File ID	Displays the case file's unique identification number.	System-Generated
Family Resource	Click in the textbox to indicate whether the family was referred to an outside agency.	Not Mandatory

Client Name	Displays the client’s name.	System-Generated
Exit Date	Click the calendar icon to make date selection when the client leaves the program.	Mandatory
MEISR-COS Rating	Click in the textbox to enter the client’s final rating when leaving the program.	Not Mandatory
Family Survey was completed	Click the dropdown to select the family survey was completed.	Mandatory
Exit Reason	Click the dropdown menu to select the reason why the client is leaving the program.	Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

16 Attach Documents

16.1 Overview

The Attach Documents Related Link allows the user to attach documents to the record. Uploaded documents will appear under the Attachments section.

16.1.1 Screenshot

16.1.2 Controls & User Actions

The following table details the controls that are present in the Attach Documents Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Attachment Type	Click the dropdown menu to select a picklist value.	Mandatory
Description	Click in the text area to enter the document description.	Not Mandatory

User Action	Description
Attach File	Click to upload a document to the record.
Drop Files	Click to move a document to the record.

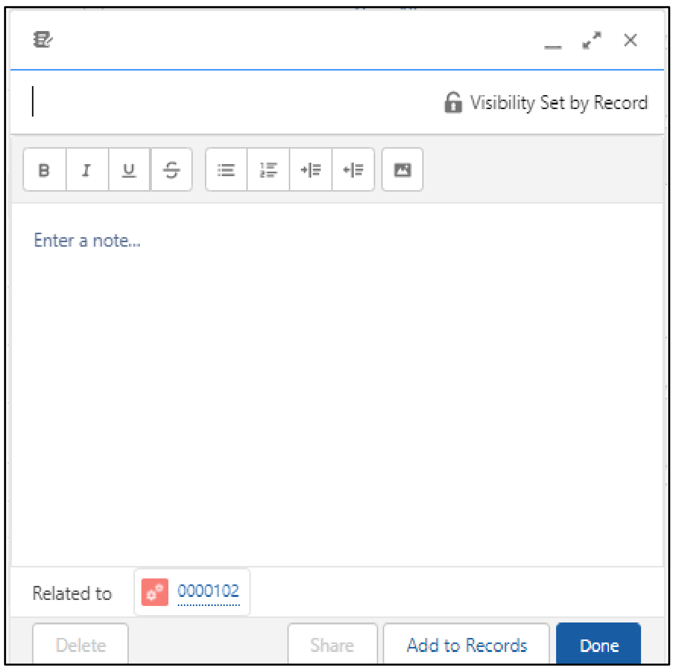
17 Notes

17.1 Overview

The Notes Related Link displays any documented notes and allows the user to create new Notes to attach to the record.

17.1.1 Screenshot

Click 'Add to Records' or 'Done' to save the new note on Application Record. 'Delete' or 'Share' enables only when text is displayed in the Subject of the note.



17.1.2 Controls & User Actions

The following table details the controls that are present on the Notes Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Subject Field	Click in the textbox field to enter a name of the note.	Not Mandatory
Body	Click in the text area field to enter note details.	Not Mandatory
Related To	Displays the case file number the note is attached to.	System Generated

User Action	Description
Add to Records	Click to add note to record.
Done	Click when note is completed.

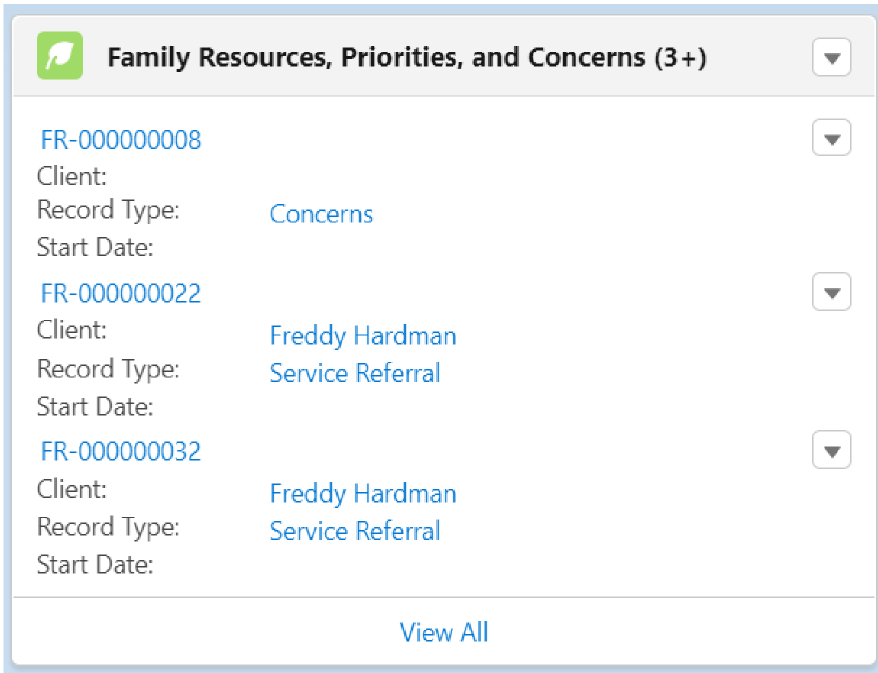
Delete	Click to remove note from record.
Share	Click to share note with others.

18 Family Resources Priorities and Concerns

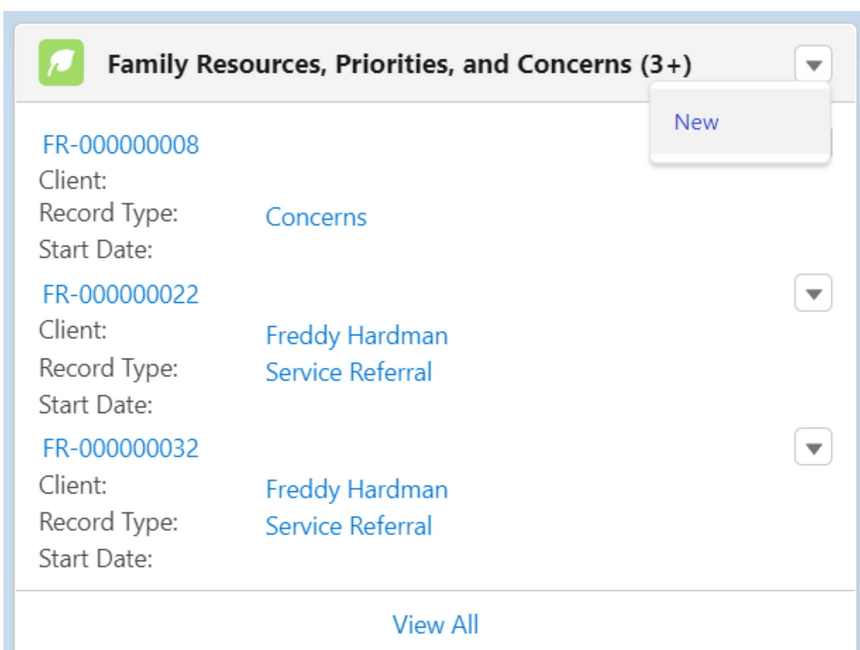
18.1 Overview

The Family Resources, Priorities, and Concerns Related link displays the parent/legal guardian's concerns for the child, priorities for the child, and service referral information.

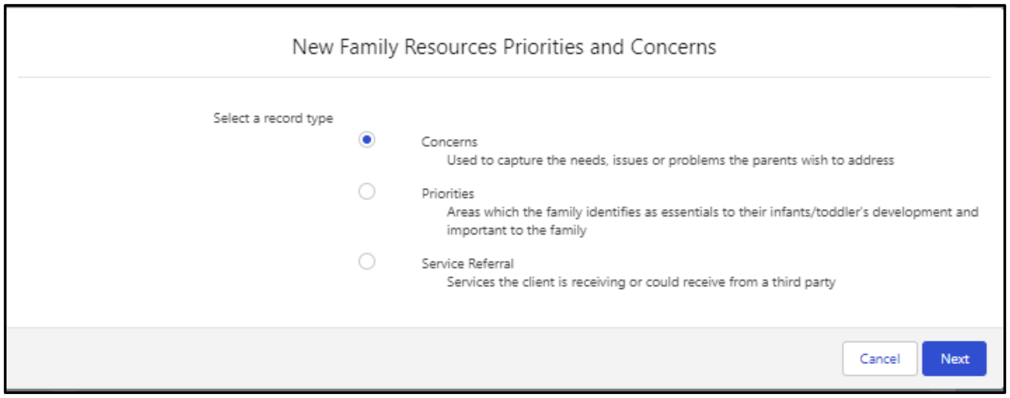
18.1.1 Screenshot



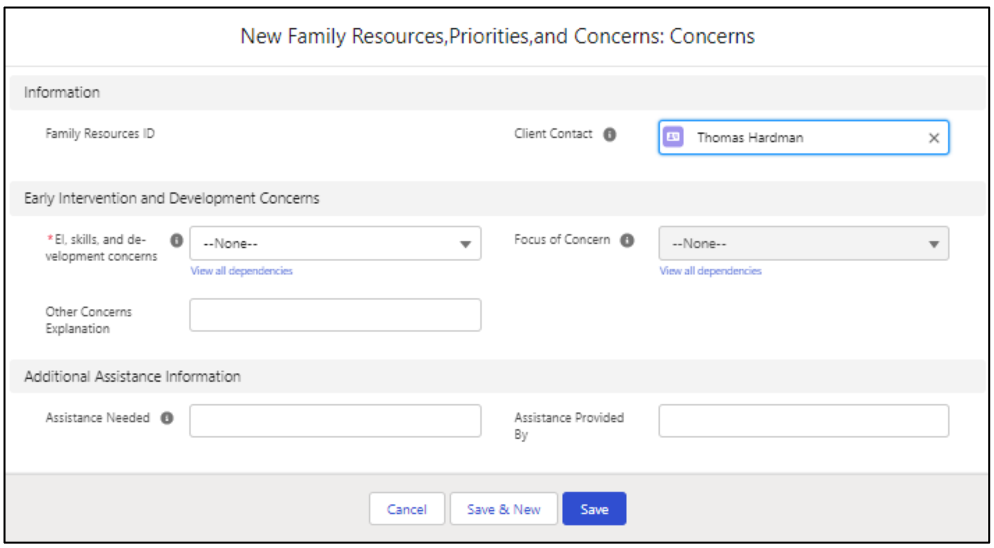
To create a new record, select "New" from the dropdown menu.



On the New Family Resources, Priorities, and Concerns pop-up window, select the radio button next to the record type and click Next.



18.1.1.1 Controls & User Actions - Concerns



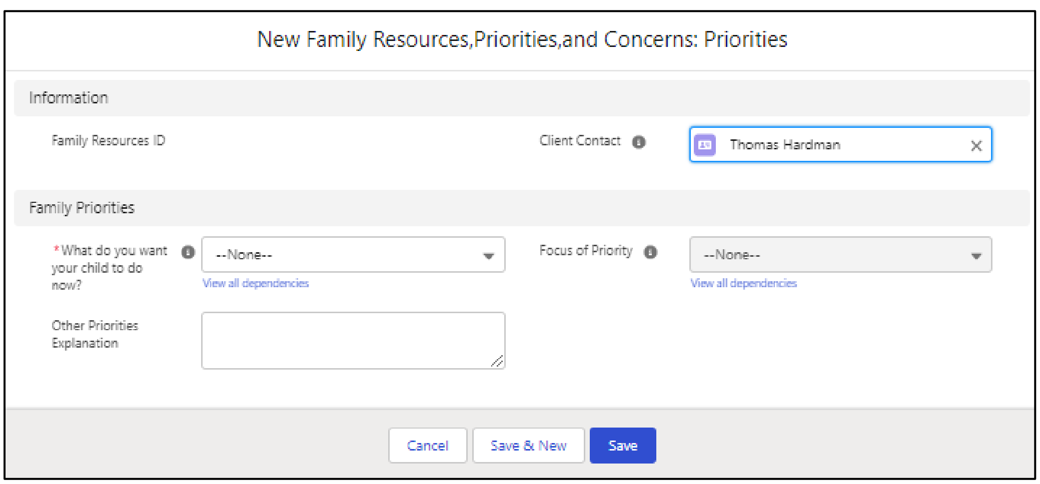
The following table details the controls that are present on the New Family Resources, Priorities, and Concerns: Concerns record page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Information		
Family Resources ID	The ID Number will auto-populate after the record is saved.	System Generated
Client Contact	Displays the Parents/Legal Guardians name.	System Generated
Early Intervention and Development Concerns		

EI, skills, and development concerns	Click the dropdown menu and make selection.	Mandatory
Focus of Concern	Click the dropdown menu and make selection.	Conditionally Mandatory
Other Concerns Explanation	Click in the textbox and enter information.	Not Mandatory
Additional Assistance Information		
Assistance Needed	Click in the textbox and enter information.	Not Mandatory
Assistance Provided By	Click in the textbox and enter information.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

18.1.1.2 Controls & User Actions - Priorities



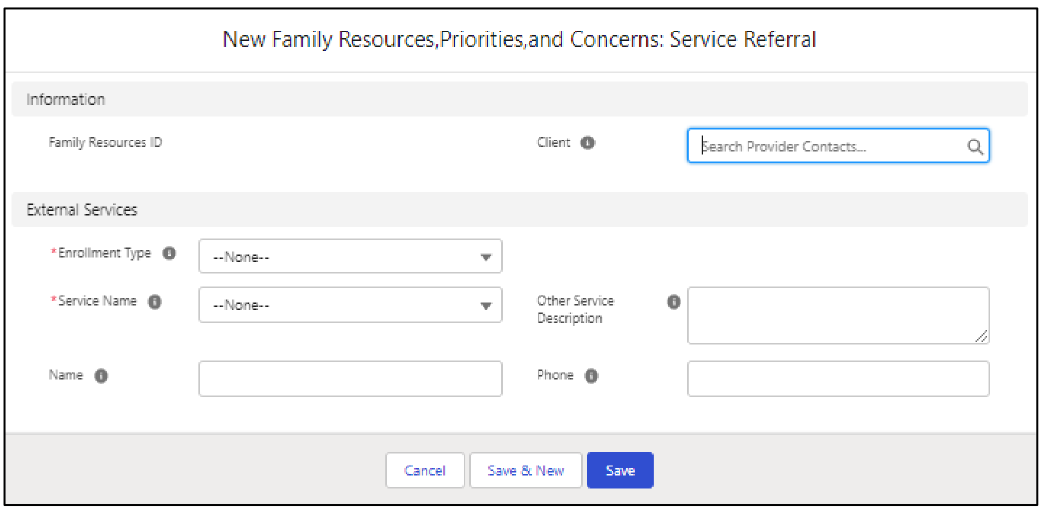
The following table details the controls that are present on the New Family Resources, Priorities, and Concerns: Priorities record page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Information		
Family Resources ID	This number will be auto-populated after saving the record.	System Generated

Client Contact	Displays the Parents/Legal Guardians name.	System Generated
Family Priorities		
What do you want your child to do now?	Click the dropdown menu and make selection.	Mandatory
Focus of Priority	Click the dropdown menu and make selection.	Conditionally Mandatory
Other Priorities Explanation	Click in the textbox and enter information.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

18.1.1.3 Controls & User Actions - Service Referral



The following table details the controls that are present on the New Family Resources, Priorities, and Concerns: Service Referral record page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Information		
Family Resources ID	This number will be auto-populated after saving the record.	System Generated
Client	Click the lookup icon to select the clients/child's name.	Not Mandatory

External Services		
Enrollment Type	Click the dropdown menu and make selection.	Mandatory
Service Name	Click the dropdown menu and make selection.	Mandatory
Other Service Description	Click in the textbox and enter information.	Not Mandatory
Name	Click in the textbox and enter information.	Not Mandatory
Phone	Click in the textbox and enter information.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

19 Create Client Contact

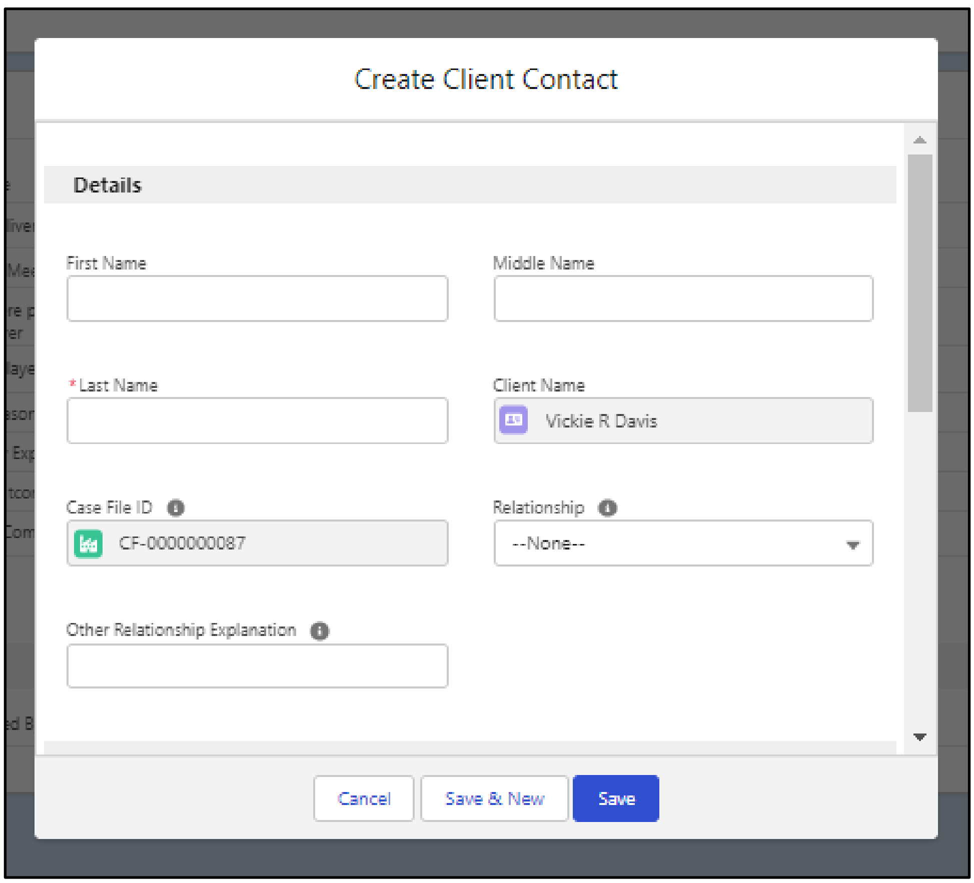
19.1 Overview

The Create Client Contact button on the Meeting Setup and Outcome page, allows the user to quickly document contact information for a person who is attending the meeting but not currently present in the AR DDS First Connections system.

19.1.1 Screenshot

On the Case File record, click the Create Client Contact button.

After the record opens, document the required field information.



19.1.1.1 Controls & User Actions

The following table details the controls that are present on the Create Client Contact record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
First Name	Click in the textbox and enter information.	Not Mandatory
Middle Name	Click in the textbox and enter information.	Not Mandatory
Last Name	Click in the textbox and enter information.	Mandatory
Client Name	The system populates the field with the client’s name.	System Generated
Case File ID	The system populates the field with the Case File ID.	Not Mandatory
Relationship	Click the dropdown menu and make selection.	Not Mandatory
Other Relationship Explanation	Click in the textbox and enter information.	Not Mandatory

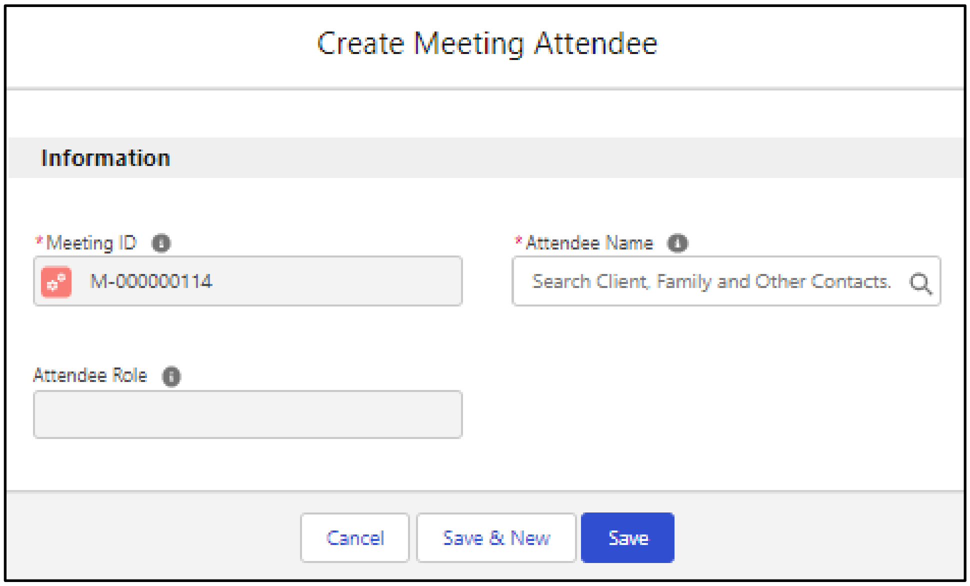
User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

20 Create Meeting Attendee

20.1 Overview

The Create Meeting Attendee allows the user to link the person attending the meeting to their contact information that is currently present in the AR DDS First Connections system.

20.1.1 Screenshot



20.1.1.1 Controls & User Actions

The following table details the controls that are present on the Create Meeting Attendee record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Meeting ID	The system populates the field with the Meeting ID.	Read-only
Attendee Name	Click the lookup icon to search and select the meeting attendant. (If you begin typing name a list will populate and selection can be made)	Mandatory
Attendee Role	This displays the role of the meeting attendant.	Read-only

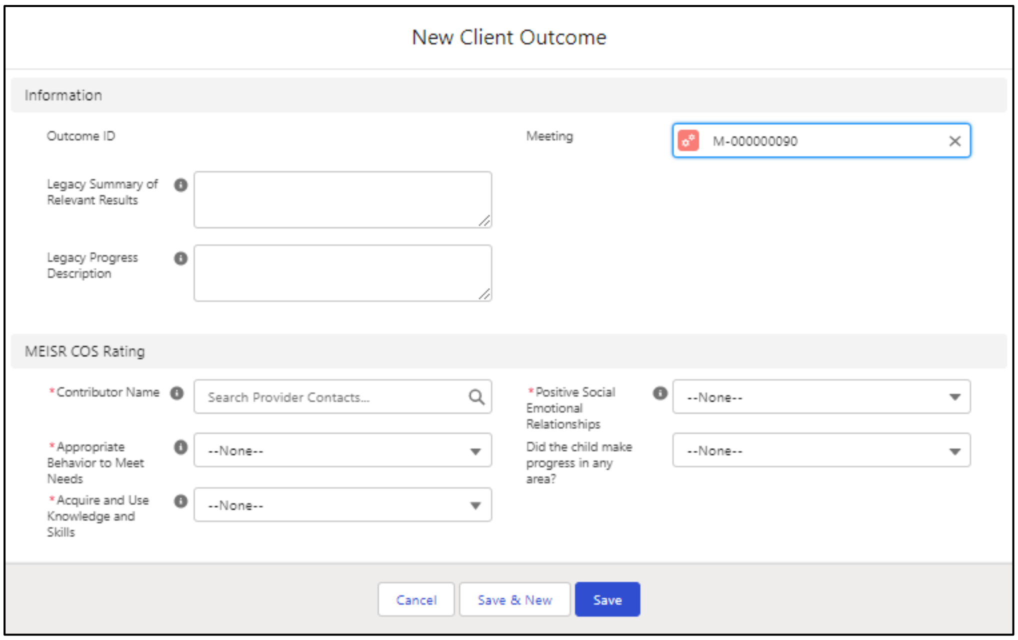
User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

21 Client Outcome

21.1 Overview

The Client Outcome related link displays documented information in reference to the MEISR COS.

21.1.1 Screenshot



21.1.1.1 Controls & User Actions

The following table details the controls that are present on the Client Outcome Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Information Section		System Generated
Outcome ID	The system populates the field with the Outcome ID.	System Generated
Meeting	The system displays the Meeting ID number.	System Generated
Legacy Summary of Relevant Results	This displays the summary of relevant results from the legacy CDS application is displayed.	Read-only
Legacy Progress Description	This displays the progress description from the legacy CDS application is displayed.	Read-only

MEISR COS Rating		
Contributor Name	Click the lookup icon to search and select the meeting attendant. (If you begin typing name a list will populate and selection can be made)	Mandatory
Positive Social Emotional Relationships	Click the dropdown menu and make selection.	Mandatory
Appropriate Behaviour to Meet Needs	Click the dropdown menu and make selection.	Mandatory
Did the child make progress in any area?	Click the dropdown menu and make selection. This field is not required for Initial or Interim IFSP; however, required for Annual and Bi-Annual.	Not Mandatory
Acquire and Use Knowledge and Skills	Click the dropdown menu and make selection.	Mandatory

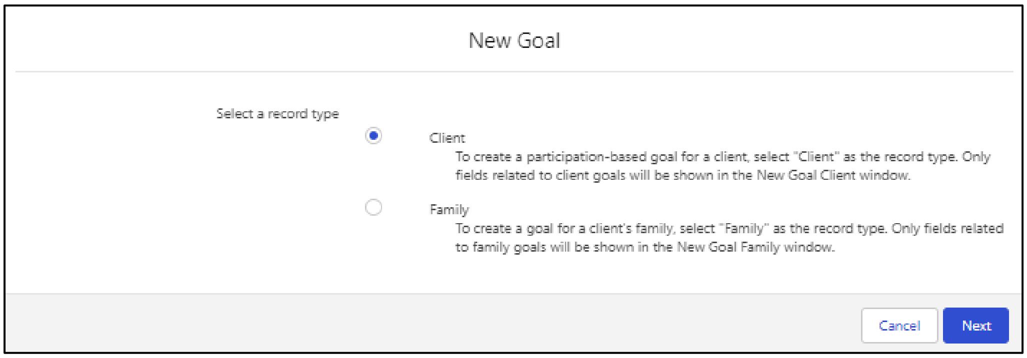
User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

22 Goals

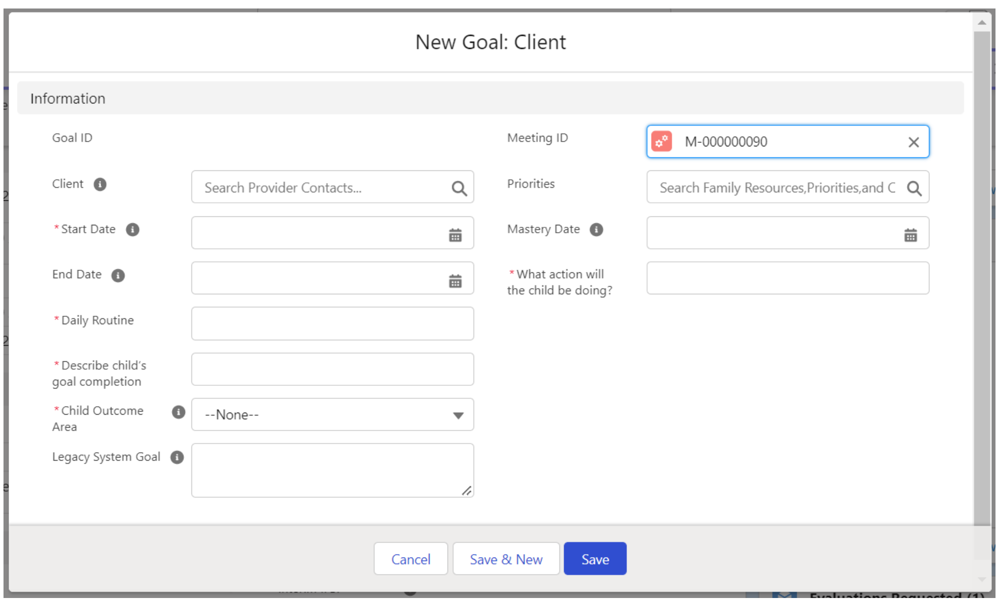
22.1 Overview

The Goals related link displays the documented goals and objectives for the client and family.

22.1.1 Screenshot



22.1.1.1 Controls & User Actions – New Goal: Client



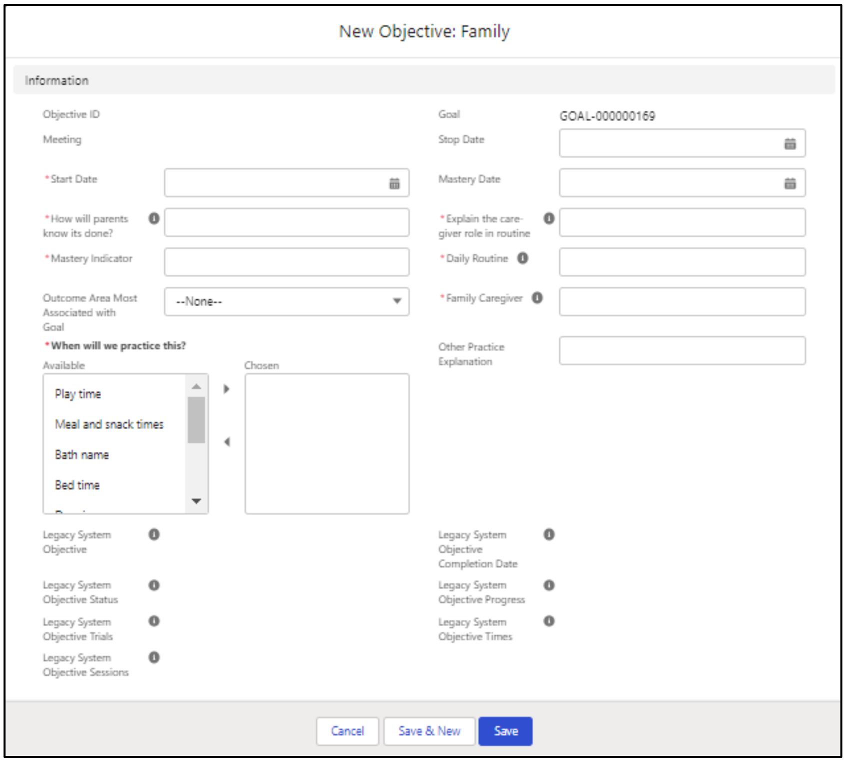
The following table details the controls that are present on the New Goal: Client record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Goal ID	The system populates the field with the Goal ID.	System Generated
Meeting ID	The system populates the field with the Meeting ID.	Read-only

Client	Displays the clients/child's name.	System Generated
Priorities	Click the lookup icon to search and select the Family Resources Priorities and concerns record to attach.	Not Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
Mastery Date	Click the calendar icon and make date selection.	Not Mandatory
End Date	Click the calendar icon and make date selection.	Not Mandatory
What action will this child be doing?	Click in the textbox and enter information.	Mandatory
Daily Routine	Click in the textbox and enter information.	Mandatory
Describe child's goal completion	Click in the textbox and enter information.	Mandatory
Child Outcome Area	Click the dropdown and make a selection.	Mandatory
Legacy System Goal	The goal from the Legacy CDS application is displayed if applicable.	System Generated

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

22.1.1.2 Controls & User Actions – New Objective: Family



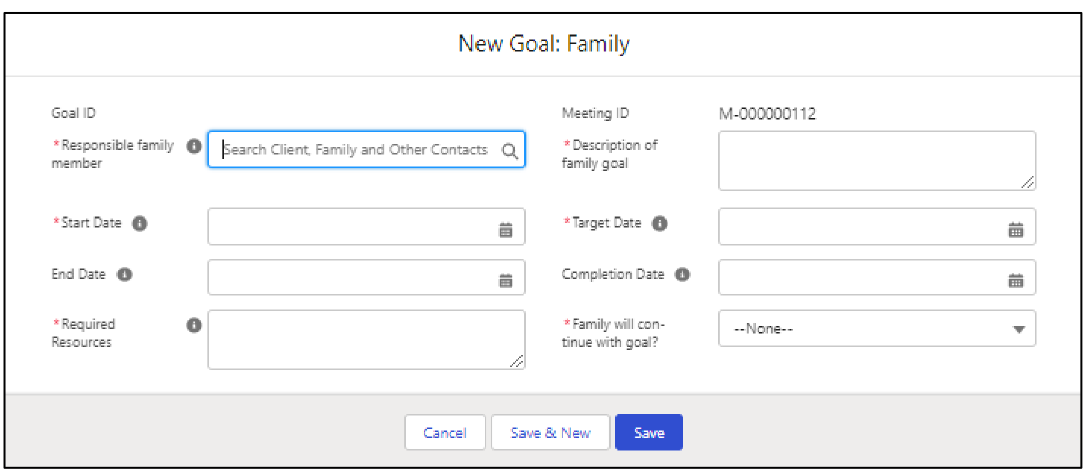
The following table details the controls that are present on the New Objective: Family (Related Link). Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Objective ID	The system populates the field with the Goal ID.	System Generated
Goal	The system populates the field with the Meeting ID.	Read-only
Meeting	Displays the clients/child’s name.	System Generated
Stop Date	Click the calendar icon and make date selection.	Not Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
Mastery Date	Click the calendar icon and make date selection.	Not Mandatory
How will parents know when it’s done?	Click in the textbox and enter information.	Mandatory
Explain the caregiver role and routine	Click in the textbox and enter information.	Mandatory
Master Indicator	Click in the textbox and enter information.	Mandatory
Daily Routine	Click the dropdown menu and make a selection.	Mandatory
Outcome Area Most Associated with Goal	Click in the textbox and enter information.	Not Mandatory

Family Caregiver	Click in the textbox and enter information.	Mandatory
When will we practice this?	This is a multi-pick select list. Highlight the selection or selections form the available columns click the arrow to move to the chosen column.	Mandatory
Other Practice Explanation	Click in the textbox and enter information.	Not Mandatory
Legacy System Objective	The objective from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Status	The objective status from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Trials	The count of objective trials from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Sessions	The objective sessions from the Legacy CDS application are displayed if applicable.	System Generated
Legacy System Objective Completion Date	The objective completion date from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Progress	The objective progress from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Times	The objective times from the Legacy CDS application is displayed if applicable.	System Generated

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

22.1.1.3 Controls & User Actions – New Goal: Family



The following table details the controls that are present on the New Goal: Family record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Goal ID	The system populates the field with the Goal ID.	System Generated
Meeting ID	The system populates the field with the Meeting ID.	Read-only
Responsible family member	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Mandatory
Description of family goal	Click in the textbox and enter information.	Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
Target Date	Click the calendar icon and make date selection.	Not Mandatory
End Date	Click the calendar icon and make date selection.	Not Mandatory
Completion Date	Click the calendar icon and make date selection.	Not Mandatory
Required Resources	Click in the textbox and enter information.	Mandatory
Family will continue with the goal?	Click the dropdown menu and make selection.	Mandatory
Attendee Role	Displays the case file number the note is attached to.	Not Mandatory

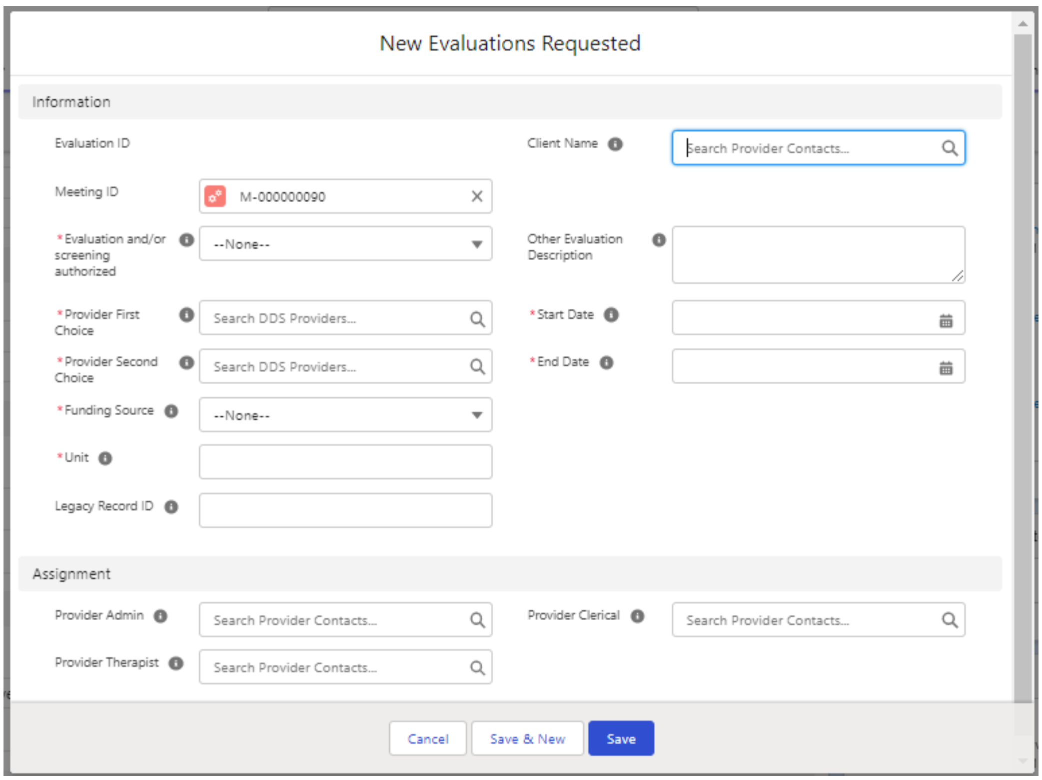
User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

23 Evaluations Requested

23.1 Overview

The Evaluations Requested related link displays all requested evaluation records for the client.

23.1.1 Screenshot



23.1.1.1 Controls & User Actions

The following table details the controls that are present on the Evaluations Requested Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Information Section		
Evaluation ID	The system populates the field with the Evaluation ID.	System Generated
Client	Displays the clients/child’s name.	System Generated
Meeting ID	The system populates the field with the Meeting ID.	Read-only

Evaluation and /or screening authorized	Click the dropdown menu and make selection.	Mandatory
Other Evaluation Description	Click in the textbox and enter information.	Not Mandatory
Provider First Choice	Click the lookup icon to make selection from the Search First Connections Providers list. (If you begin typing name a list will populate and selection can be made)	Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
Provider Second Choice	Click the lookup icon to make selection from the Search First Connections Providers list. (If you begin typing name a list will populate and selection can be made)	Mandatory
End Date	Click the calendar icon and make date selection.	Mandatory
Funding Source	Click the dropdown menu and make selection.	Mandatory
Units	Click in the textbox and enter information.	Mandatory
Legacy Record ID	The record ID converted from Legacy CDS application will display if applicable.	System Generated
Assignment Section		
Provider Admin	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
Provider Clerical	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
Provider Therapist	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory

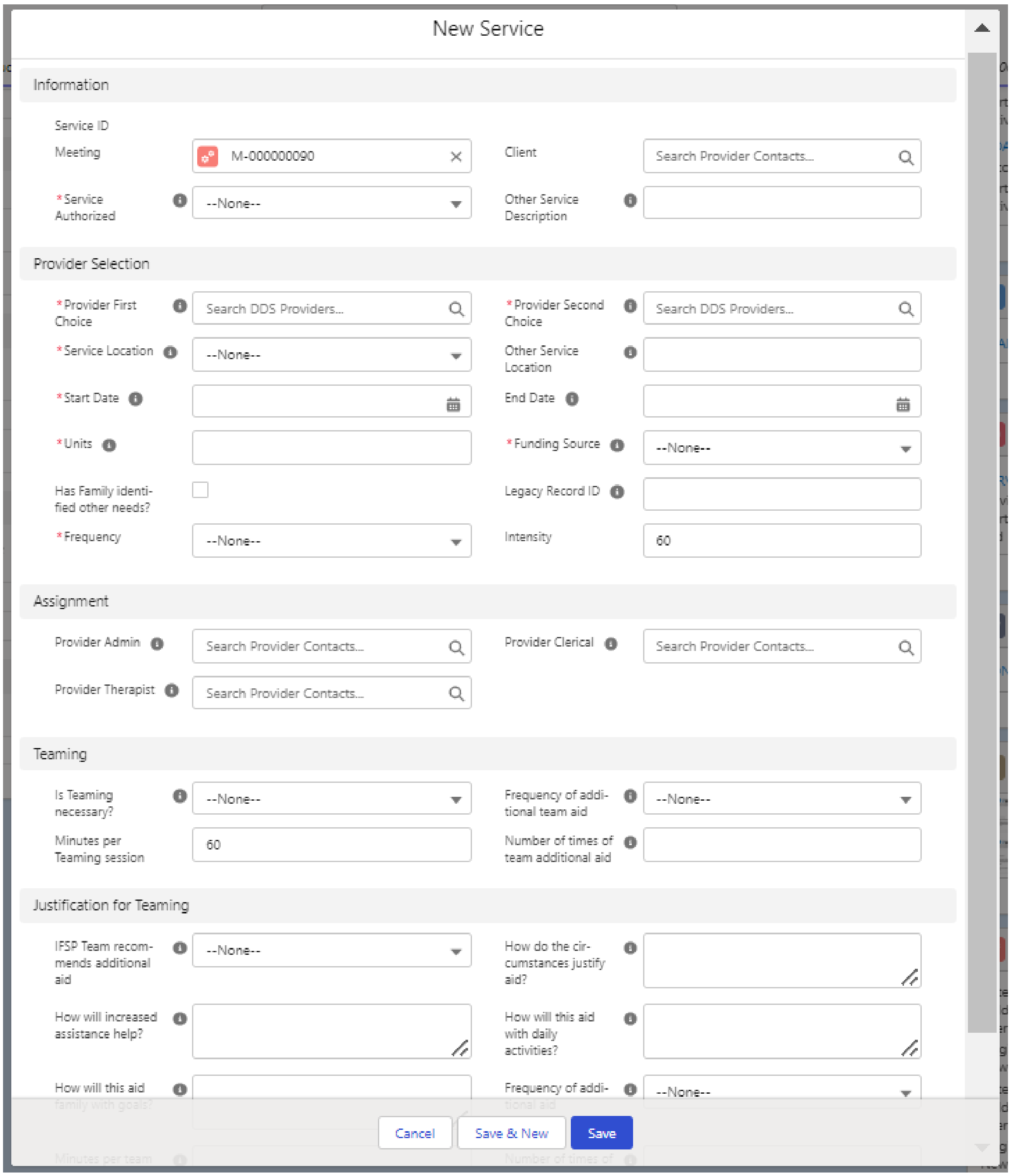
User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

24 Services

24.1 Overview

The Services Related Link displays the documented requested service information for the client.

24.1.1 Screenshot



24.1.1.1 Controls & User Actions-Client

The following table details the controls that are present on the Services Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Information Section		
Service ID	The system populates the field with the service ID.	System Generated
Meeting ID	The system populates the field with the Meeting ID.	Read-only
Client	Displays the clients/child's name.	System Generated
Service Authorized	Click the dropdown menu and make selection.	Mandatory
Other Service Authorized	Click in the textbox and enter information.	Not Mandatory
Provider Selection Section		
Provider First Choice	Click the lookup icon to make selection from the Search First Connections Providers list. (If you begin typing name a list will populate and selection can be made)	Mandatory
Provider Second Choice	Click the lookup icon to make selection from the Search First Connections Providers list. (If you begin typing name a list will populate and selection can be made)	Mandatory
Service Location	Click the dropdown menu and make selection.	Mandatory
Other Service Location	Click in the textbox and enter information.	Not Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
End Date	Click the calendar icon and make date selection.	Not Mandatory
Units	Click in the textbox and enter information.	Mandatory
Funding Source	Click the dropdown menu and make selection.	Mandatory
Has Family identified other needs?	Click the checkbox if applicable.	Not Mandatory
Legacy Record ID	The record ID converted from Legacy CDS application will display if applicable.	System Generated
Frequency	Click the dropdown menu and make selection.	Mandatory
Intensity	Click in the textbox and enter information.	Not Mandatory

Assignment Section		
Provider Admin	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
Provider Clerical	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
Provider Therapist	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
Teaming		
Is Teaming necessary?	Click the dropdown menu and make selection.	Not Mandatory
Frequency of additional team aid	Click the dropdown menu and make selection.	Not Mandatory
Minutes per Consulting Session	Click in the textbox and enter information.	Not Mandatory
Number of times of team additional aid	Click in the textbox and enter information.	Not Mandatory
Justification for Teaming		
IFSP Team recommends additional aid	Click the dropdown menu and make selection.	Not Mandatory
How do the circumstances justify aid?	Click in the textbox and enter information.	Not Mandatory
How will increased assistance help?	Click in the textbox and enter information.	Not Mandatory
How will this aid with daily activities?	Click in the textbox and enter information.	Not Mandatory
How will this aid family with goals?	Click in the textbox and enter information.	Not Mandatory
Frequency of additional aid	Click the dropdown menu and make selection.	Not Mandatory
Minutes per team session	Click in the textbox and enter information.	Not Mandatory
Number of times of additional aid	Click in the textbox and enter information.	Not Mandatory

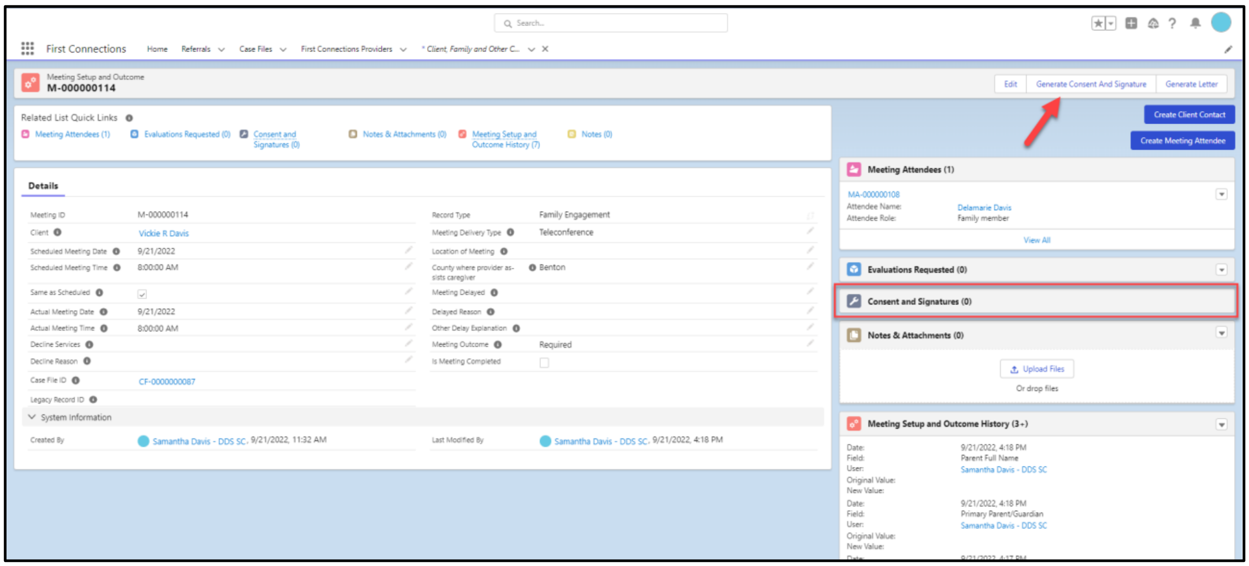
User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

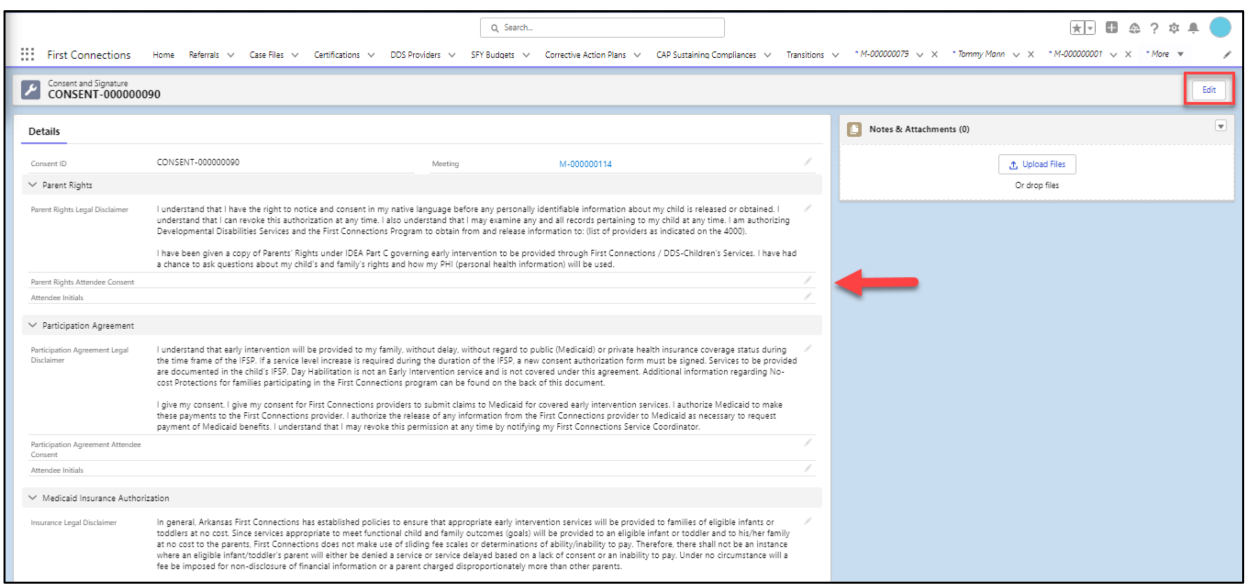
25 Consent and Signatures

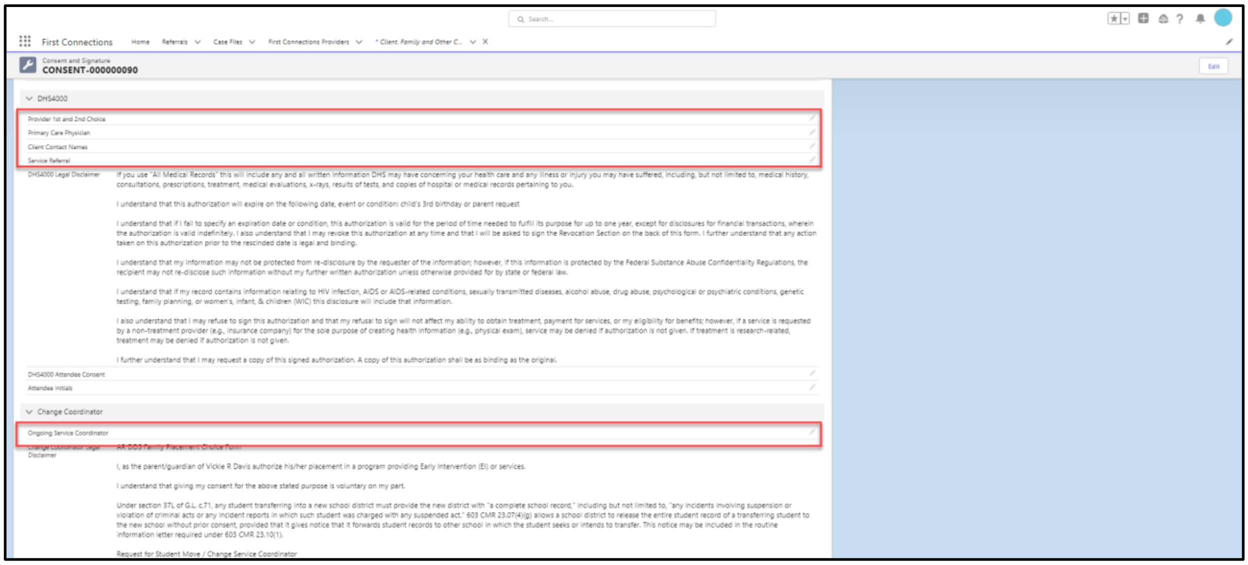
25.1 Overview

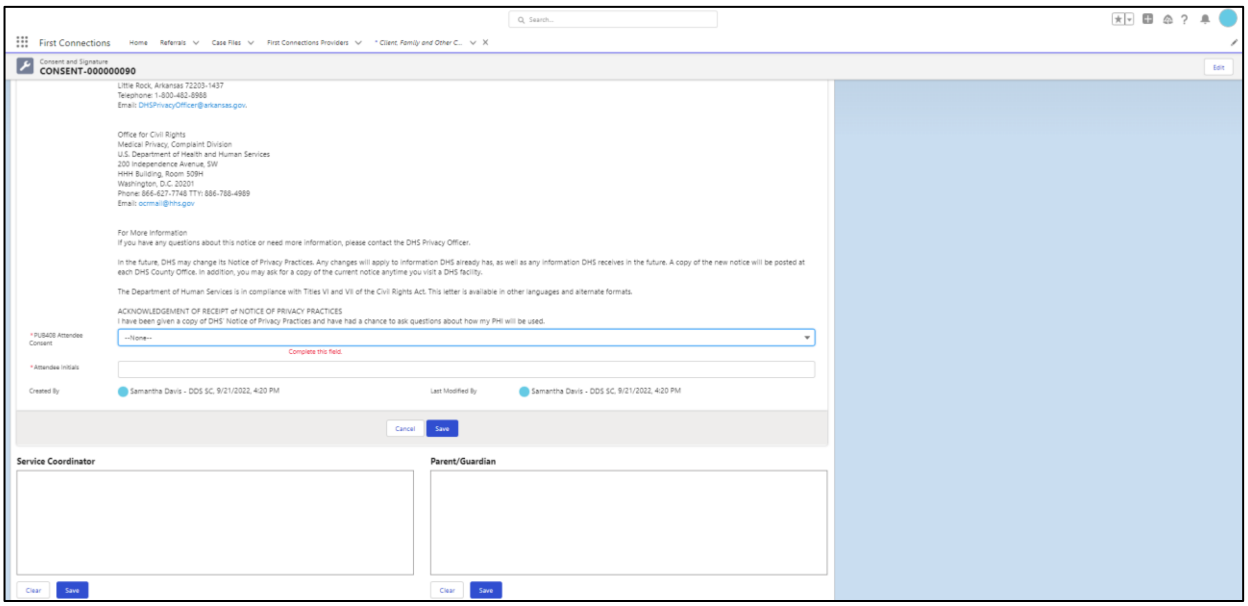
The Consent and Signatures related link displays all consent and signature records for the service coordinator and the parent/legal guardian. On the Meeting Setup and Outcomes display page, in the action buttons section, there is a button to Generate Consent and Signatures. This will display the Consent and Signatures page.

25.1.1 Screenshot









25.1.1.1 Controls & User Actions-Client

The following table details the controls that are present on the Consent and Signatures Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Parent Rights Attendee Consent	Click the dropdown menu and make selection.	Mandatory
Participation Agreement Attendee Consent	Click the dropdown menu and make selection.	Mandatory
Insurance Attendee Consent	Click the dropdown menu and make selection.	Mandatory
Tele Intervention Attendee Consent	Click the dropdown menu and make selection.	Mandatory

Evaluation Attendee Consent	Click the dropdown menu and make selection.	Mandatory
DHS4000 Attendee Consent	Click the dropdown menu and make selection. Also	Mandatory
Provider Names (1 and 2 Choice)	Click in the textbox and enter information.	Mandatory
Primary Care Physician Name	Click in the textbox and enter information.	Mandatory
Client Contact Name (All)	Click in the textbox and enter information.	Mandatory
Service Referral (Name of contact if the client was referred to an external service)	Click in the textbox and enter information.	Mandatory
Ongoing Service Coordinator	Click in the textbox and enter information.	
Change Coordinator Attendee Consent	Click the dropdown menu and make selection.	Mandatory
PUB408 Attendee Consent	Click the dropdown menu and make selection.	Mandatory
Attendee Initials	Click the dropdown menu and make selection.	Mandatory

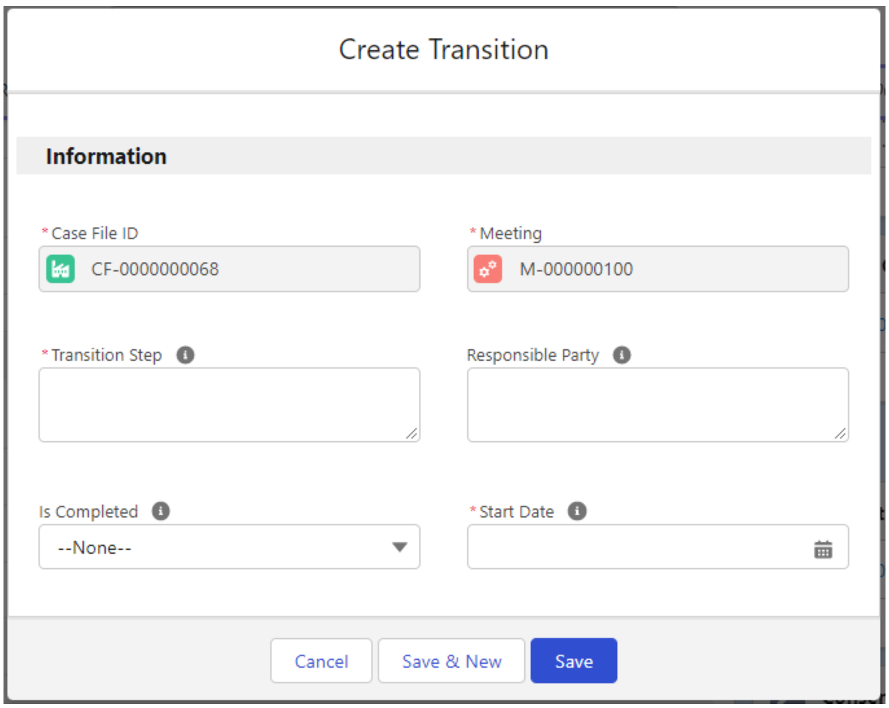
User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save	Click the save button to save the information and remain on the page.
Clear	Click the clear button to clear the information and remain on the page.

26 Create Transition

26.1 Overview

The Create Transition button initiates the process of completing a transition plan record for the client.

26.1.1 Screenshot



26.1.1.1 Controls & User Actions

The following table details the controls that are present on the Create Transition record. Each control includes a description and control type. Each user action includes a description.

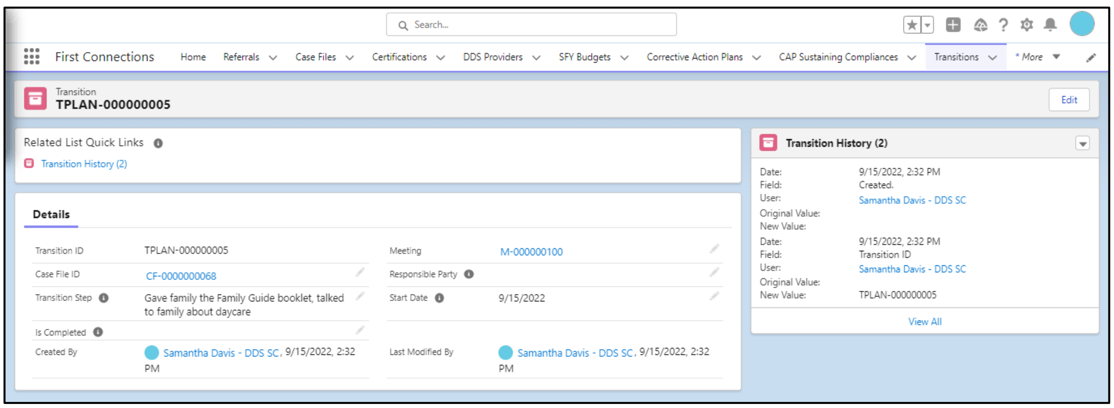
Controls	Description	Control Type
Case File ID	The system populates the field with the Case File ID number.	System Generated
Meeting	The system populates the field with the assigned Meeting ID number.	System Generated
Transition Step	Click in the textbox and enter information.	Mandatory
Responsible Party	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin	Not Mandatory

	typing name a list will populate and selection can be made)	
Is Completed	Click the dropdown menu and make selection.	Not Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

26.1.2 Screenshot – Transition Related Links Details

The Transition record displays the documented transition plan details for the client.



26.1.2.1 Controls & User Actions-Client

The following table details the controls that are present on the Transition Related Link record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Transition Plan ID	Displays the Transaction Plan ID number.	Read-only
Meeting	Displays the Meeting ID number.	Read-only
Case File ID	Display the Case File ID number.	Read-only
Transition Step	Displays the detailed information entered.	Editable
Responsible Party	Displays the Client, Family and Other Contacts name of person selected.	Editable
Is Completed	Displays the information selected from dropdown menu.	Editable
Start Date	Displays the start date.	Editable
Created By	Displays who created the record.	System Generated

Last Modified By	Displays who last modified the record.	System Generated

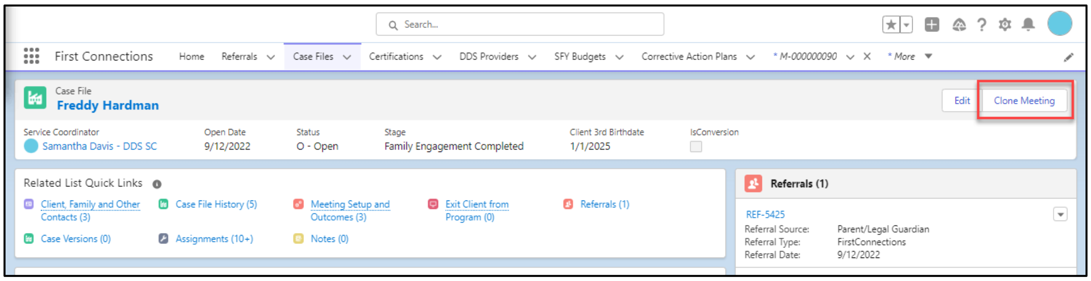
User Action	Description
Edit	Click the edit button or edit pencil to update or change record.

27 Clone Meeting

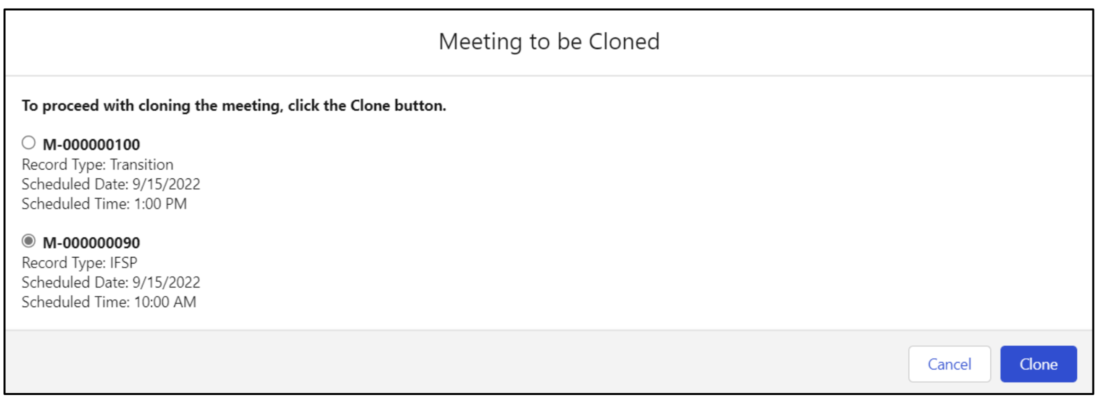
27.1 Overview

The Clone Meeting Action Button provides a quick way for the user to duplicate a meeting without having to document certain meeting information.

27.1.1 Screenshot



From the pop-up window, click the radio button next to the meeting record type and click "Clone."



27.1.1.1 Controls & User Actions

The following table details the controls that are present on the Clone Meeting record. Each control includes a description and control type. Each user action includes a description.

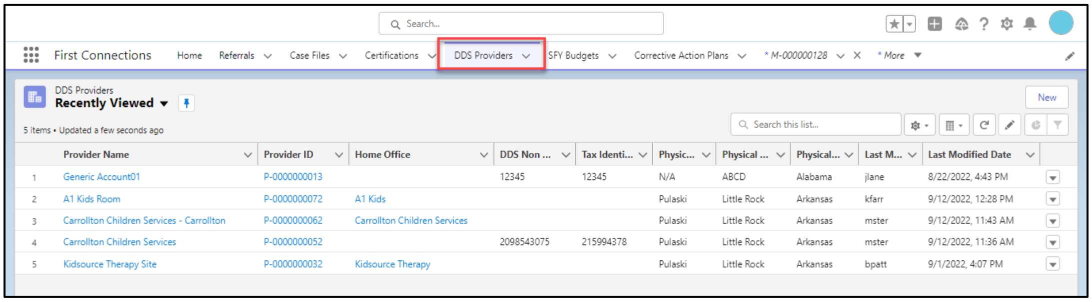
User Actions	Description
Cancel	Click the cancel button to leave the page and not save any information.
Clone	Click the clone button to duplicate the record type.

28 DDS Providers

28.1 Overview

The DDS Providers page can be accessed by clicking the DDS Providers tab in the Top Navigation Bar. A list of all DDS Providers can be found on this page. The user is also able to navigate to individual provider records via the DDS Providers List View Page.

28.1.1 Screenshot



28.1.1.1 Controls & User Actions

The following table details the controls that are present on the DDS Providers List View page. Each control includes a description and control type. Each user action includes a description.

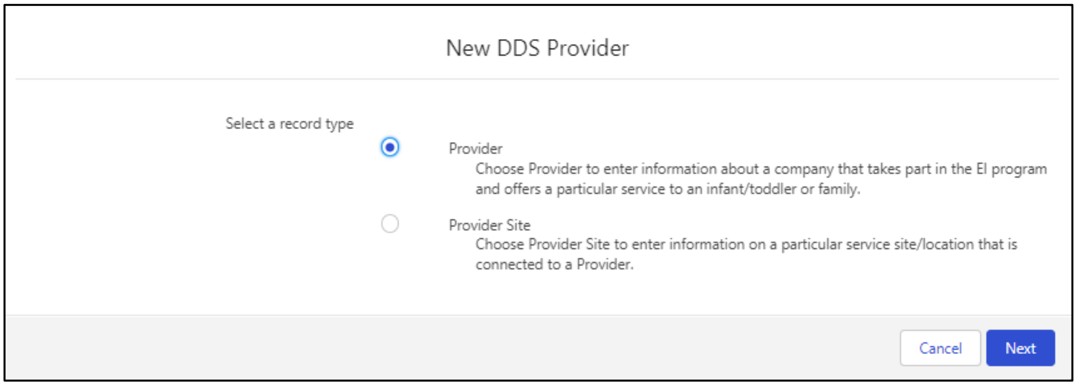
Controls	Description	Control Type
Edit List View	Dropdown list that displays several options the user can select to modify the view provider information selected.	Always enabled
New	Opens a pop-up box where users can create a brand-new provider record.	Always enabled
Provider Table	Displays provider records and the corresponding provider information.	Always enabled

User Action	Description
Navigation	Navigate to the Referrals Page by clicking on the Referrals tab in the global menu.
Select List View	Click the ▼ (to the right of 'Recently Viewed' on the screenshot) to open a dropdown list with the following options: • All First Connections Providers • All Provider Sites • My DDS Providers • Recently Viewed • Recently Viewed DDS Providers Select one of these options to display the corresponding referrals in the Referrals Table. Use the button to make the selected view your default view.

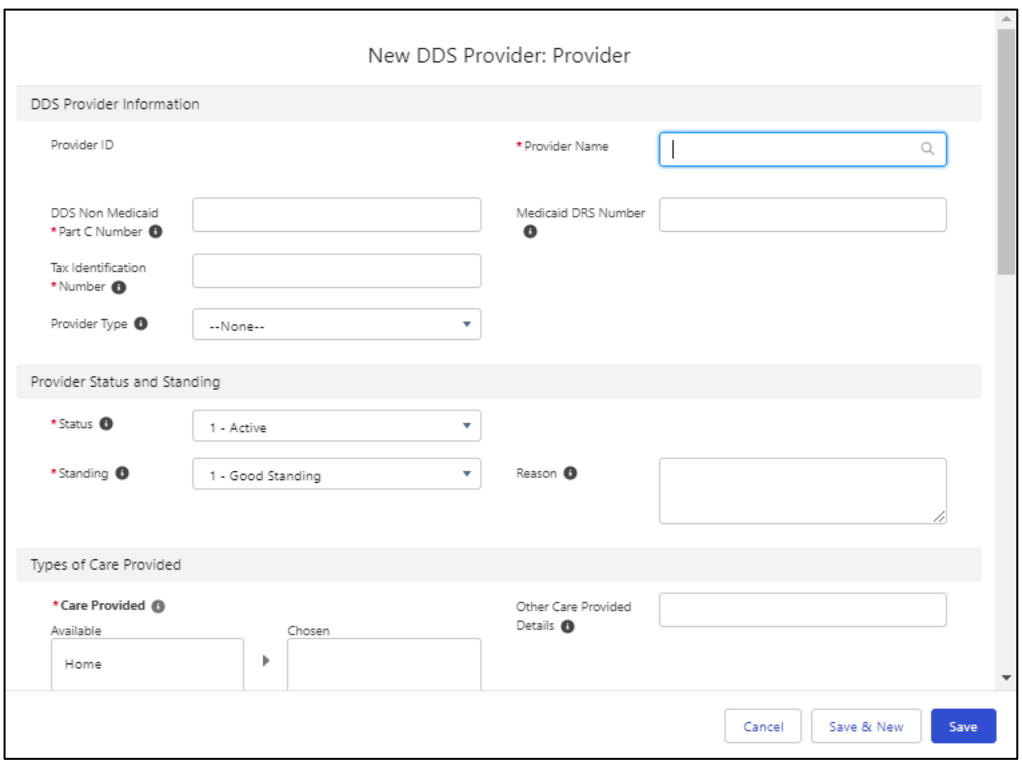
New	Click the “New” button to open a blank form to create a new provider record.
Provider Table	Click the Provider Name or Provider ID Number to navigate to the corresponding Provider Details page.

28.1.2 Screenshot

From the New DDS Provider pop-up window, select the radio button next to the provider record and click “Next.”



28.1.3 Screenshot – Provider



28.1.3.1 Controls & User Actions

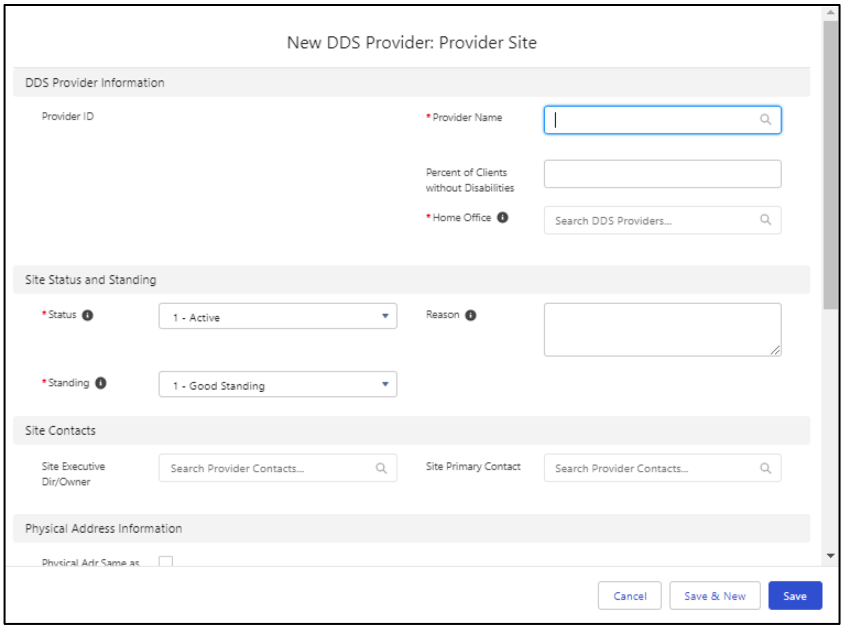
The following table details the controls that are present on the DDS Providers: Provider record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
DDS Provider Information		
Provider ID	The system will populate this field when the record is saved.	System-Generated
Provider Name	Click in the look-up field to enter details.	Mandatory
DDS Non Medicaid Part C Number	Click in the textbox to enter details.	Mandatory
Medicaid DRS Number	Click in the textbox to enter details.	Not Mandatory
Tax Identification Number	Click in the textbox to enter details.	Mandatory
Provider Type	Click the drop-down menu to make a selection.	Not Mandatory
Provider Status and Standing		
Status	Click the drop-down menu to make a selection.	Mandatory
Standing	Click the drop-down menu to make a selection.	Mandatory
Reason	Click in the text area to enter details.	Not Mandatory
Types of Care Provided		
Care Provided	Make selection from the multi-select list.	Mandatory
Other Care Provided	Client in the textbox field to enter details.	Not Mandatory
Community Care Provided Details	Make selection from the multi-select list.	Not Mandatory
Provider Contacts		
Executive Dir/Owner	Click in the look-up field to enter details.	
Primary Contact	Click in the look-up field to enter details.	
Physical Address Information		
Physical Address 1	Click in the text box to enter physical address.	Mandatory
Physical Address 2	Click in the text box to enter addition physical address details.	Not Mandatory
Physical Address City	Click in the text box to enter City.	Mandatory
Physical Address State	Click the drop-down to select State.	Mandatory

Physical Address County	Click in the text box to enter Zip Code	Mandatory
Physical Address Zip Code	Click the drop-down to make County selection.	Mandatory
Mailing Address Information		
Same as Physical Address	Click the checkbox if the mailing address is the same as the physical address.	Not Mandatory
Mailing Address 1	Click in the text box to enter mailing address.	Not Mandatory
Mailing Address 2	Click in the text box to enter additional mailing address details.	Not Mandatory
Mailing Address City	Click in the text box to enter City.	Not Mandatory
Mailing Address State	Click the drop-down to select State.	Not Mandatory
Mailing Address Zip Code	Click in the text box to enter Zip Code.	Not Mandatory
System Information		
Legacy Record ID	Displays if record is converted from legacy system.	System-Generated
Home Office	Click the lookup icon to make a selection.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

28.1.4 Screenshot



28.1.4.1 Controls & User Actions

The following table details the controls that are present on the DDS Providers: Provider Site record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
DDS Provider Information		
Provider ID	The system will populate this field when the record is saved.	System-Generated
Provider Name	Click in the look-up field to enter details.	Mandatory
Percentage of Clients without Disabilities	Client in the textbox field to enter details.	Not Mandatory
Home Office	Click in the look-up field to enter details.	Mandatory
Site Status and Standing		
Site Executive Dir/Owner	Click in the look-up field to enter details.	Not Mandatory
Site Primary Contact	Click in the look-up field to enter details.	Not Mandatory
Physical Address Information		
Physical Adr Same as Prvdr Physical Adr	Click the checkbox if applicable.	Not Mandatory

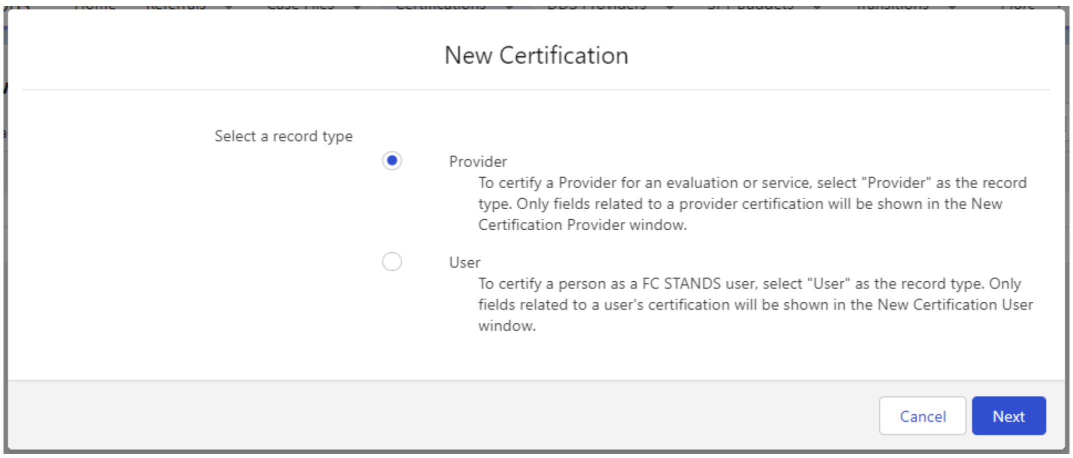
Physical Address 1	Click in the text box to enter physical address.	Mandatory
Physical Address 2	Click in the text box to enter addition physical address details.	Not Mandatory
Physical Address City	Click in the text box to enter City.	Mandatory
Physical Address State	Click the drop-down to select State.	Mandatory
Physical Address County	Click in the text box to enter Zip Code	Mandatory
Physical Address Zip Code	Click the drop-down to make County selection.	Mandatory
Mailing Address Information		
Same as Physical Address	Click the checkbox if the mailing address is the same as the physical address.	Not Mandatory
Same as Provider Mailing address	Click the checkbox if the mailing address is the same as the provider mailing address.	Not Mandatory
Mailing Address 1	Click in the text box to enter mailing address.	Not Mandatory
Mailing Address 2	Click in the text box to enter additional mailing address details.	Not Mandatory
Mailing Address City	Click in the text box to enter the City.	Not Mandatory
Mailing Address State	Click the drop-down to select the State.	Not Mandatory
Mailing Address Zip Code	Click in the text box to enter the Zip Code.	Not Mandatory
System Information		
Legacy Record ID	Displays if record is converted from legacy system.	System-Generated

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

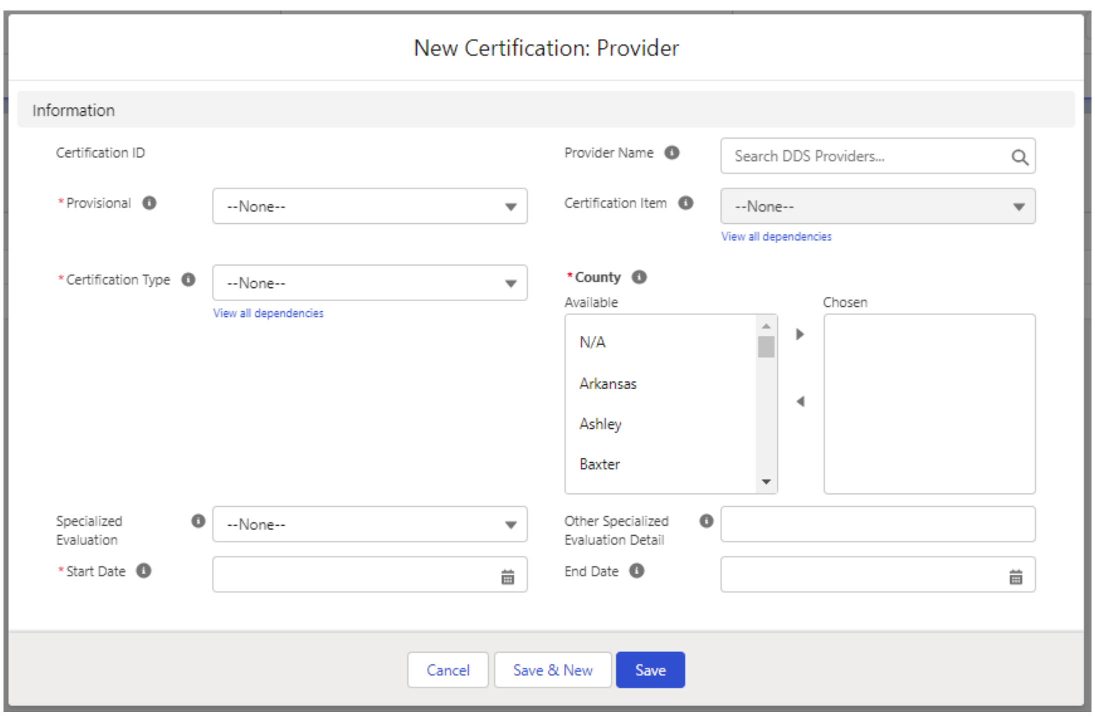
29 Certifications

29.1 Overview

The Certification Related Link is used to document whether a provider or user is certified to provide evaluations and services they offer. A provider may be certified for several Evaluations and/or Services and can serve in a limited or unlimited number of counties in Arkansas.



29.1.1 Screenshot - Provider

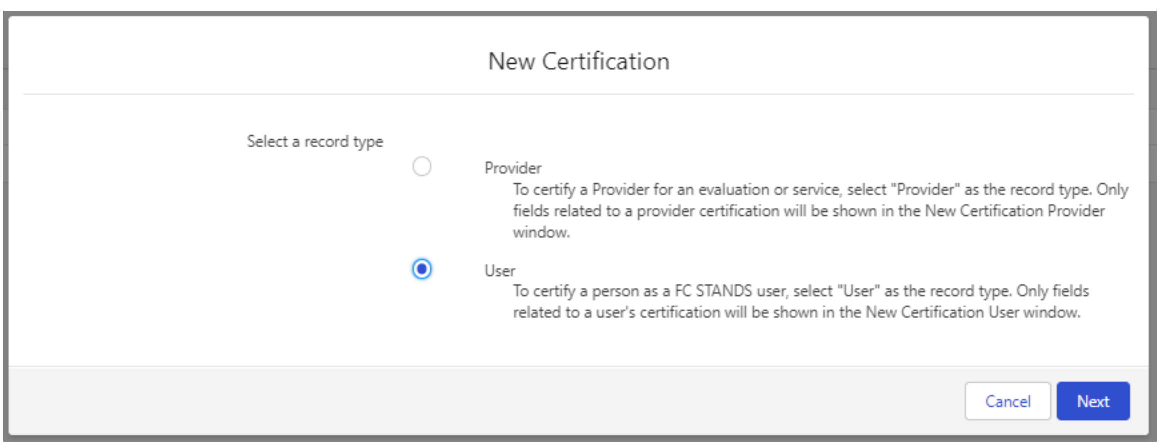


29.1.1.1 Controls & User Actions

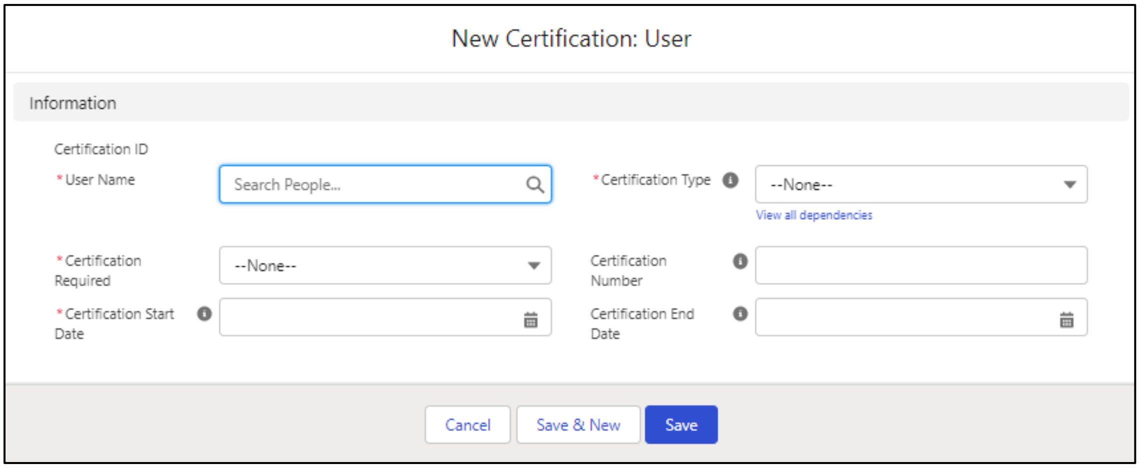
The following table details the controls that are present on the New Certification: Provider record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Information		
Certification ID	The system will populate this field when the record is saved.	System-Generated
Provider Name	Click in the look-up field to enter details.	Not Mandatory
Provisional	Click the dropdown menu and make a selection.	Mandatory
Certification Item	Click the dropdown menu and make a selection.	Not Mandatory
Certification Type	Click the dropdown menu and make a selection.	Mandatory
County	Make a selection from the multi-select picklist.	Mandatory
Specialized Evaluation	Click the dropdown menu and make a selection.	Not Mandatory
Other Specialized Evaluation Detail	Click in the textbox to enter details.	Conditionally Mandatory
Start Date	Click the calendar icon to make a date selection.	Mandatory
End Date	Click the calendar icon to make a date selection.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.



29.1.2 Screenshot – User



29.1.2.1 Controls & User Actions

The following table details the controls that are present on the DDS Providers: Provider Site record. Each control includes a description and control type. Each user action includes a description.

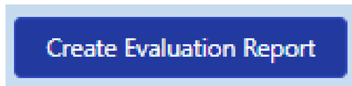
Controls	Description	Control Type
Information	The system will populate this field when the record is saved.	System-Generated
User Name	Click in the look-up field to enter details.	Mandatory
Certification Type	Click the dropdown menu and make a selection.	Mandatory
Certification Required	Click the dropdown menu and make a selection.	Mandatory
Certification Number	Click in the textbox to enter details.	Not Mandatory
Certification Start Date	Click the calendar icon to make a date selection.	Mandatory
Certification End Date	Click the calendar icon to make a date selection.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

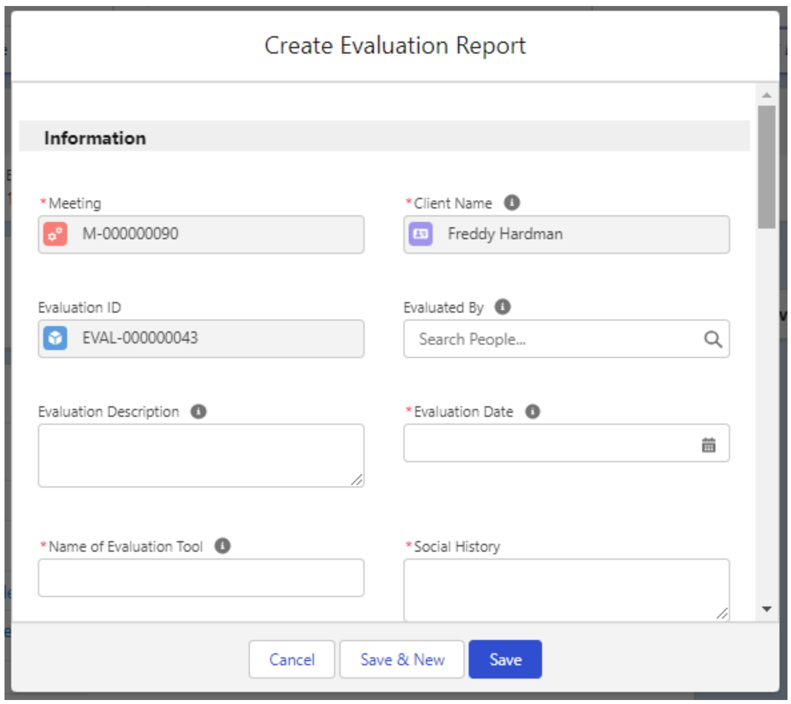
30 Evaluation Report

30.1 Overview

The Evaluation Report Action Button allows the user to record session and services delivered by provider therapists for a client.



30.1.1 Screenshot



30.1.1.1 Controls & User Actions

The following table details the controls that are present on the Evaluation Report record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Information		
Meeting	Populates with Meeting ID.	System-Generated
Client Name	Populates with name of client.	System-Generated
Evaluation ID	Populates with Evaluation ID.	System-Generated

Evaluated By	Click in the look-up field to enter details.	Not Mandatory
Evaluation Description	Click in the text area to enter details.	Not Mandatory
Evaluation Date	Click the calendar icon to make a date selection.	Mandatory
Name of Evaluation Tool	Click in the textbox to enter details.	Mandatory
Social History	Click in the text area to enter details.	Mandatory
Strengths	Click in the text area to enter details.	Mandatory
Needs	Click in the text area to enter details.	Mandatory
Developmental Therapy Evaluation		
Physical (Fine Motor)	Click in the textbox to enter details.	Not Mandatory
Physical (Gross)	Click in the textbox to enter details.	Not Mandatory
Communication (Expressive)	Click in the textbox to enter details.	Not Mandatory
Communication (Receptive)	Click in the textbox to enter details.	Not Mandatory
Overall Physical Delay	Click in the textbox to enter details.	Conditionally Mandatory
Overall Communication Delay	Click in the textbox to enter details.	Conditionally Mandatory
Social/Emotional	Click in the textbox to enter details.	Not Mandatory
Adaptive	Click in the textbox to enter details.	Not Mandatory
Cognitive	Click in the textbox to enter details.	Not Mandatory
Speech Therapy Evaluation		
Communication (Expressive)(ST)	Click in the textbox to enter details.	Not Mandatory
Communication (Receptive)(ST)	Click in the textbox to enter details.	Not Mandatory
Overall Communication Delay	Click in the textbox to enter details.	Conditionally Mandatory
Physical Therapy Evaluation		
Stationary	Click in the textbox to enter details.	Not Mandatory
Object Manipulation	Click in the textbox to enter details.	Not Mandatory
Locomotion	Click in the textbox to enter details.	Not Mandatory

Gross Motor Quotation	Click in the textbox to enter details.	Not Mandatory
Occupational Therapy Evaluation		
Fine Motor	Click in the textbox to enter details.	Not Mandatory
Grasp	Click in the textbox to enter details.	Not Mandatory
Visual Reception	Click in the textbox to enter details.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.